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Behavioral Health EHR

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Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

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Logs

Lemoyne, Hal G

Supp.

ED Visit

This is the Chart Face for: **Lemoyne, Hal G**

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Adjustment disorder with depressed mood, F43.21 (ICD-10) (Active)

Homelessness unspecified, Z59.00 (ICD-10)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

Has been self injurious

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 19

1) 6/1/23

Group Therapy Note (SOS)

SOS

Time spent face to face with patient and/or family and coordinati

Session start: 12:30 PM

Session end: 3:30 PM

2) 6/1/23

Progress Note (Non-Rx) (SOS)

SOS

Presenting problem: irritable

Hal presents as stable. No psychiatric complaints are today exp

Hal's behavior in the session was cooperative and attentive with

3) 5/31/23

Progress Note (Non-Rx) (SOS)

SOS

PRESENTING PROBLEMS ; Client presents as melancholy, but ea

RECENT HISTORY ; Client has a history of homelessness, financi

Struggles with a depressive adjustment disorder.

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

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Chart Room

Settings & Directories

Specific to Individual

You are allowed to see all group members because you are a Group Administrator.

Group Level

1) Amber Patterson, CPSW
User Name: ambie

2) Christina Wolford, LCSW
User Name: spinadmin

3) Daniella Ramirez, CPSW
User Name: spinhousingnm

4) Jeffrey Finer, CPSW
User Name: peersupport

5) Jesse Berkowitz, LMSW
User Name: jmb

6) Joy Leatherman, CPSW
User Name: anotherlogin2

7) Kathy Quarrell, CPSW
User Name: spindeming

8) Lawren Davenport, CPSW
User Name: spinhousing2

9) Michelle Grayless, MSW,
User Name: wth

10) Patricia Perez, CPSW
User Name: demingmen

11) Silver Tabor, CSW
User Name: notherambie

12) Veronica Diaz, CPSW
User Name: anotherlogin

Personal Info

Caseload

Billing Rates & Payer Rules

ICD-10 Codes

Custom Bu

The following patients have been assigned to
Christina Wolford, LCSW

1)	Acosta, Rosalie	1/17/1994	100001073318
2)	Allen, Barbara	1/30/1968	127
3)	Allensworth, Ashley	6/1/1984	100001073063
4)	Alviso, Anthony R	1/7/1987	100001072229
5)	Amyx, Andrea	8/7/1986	100001073407
6)	Armendariz, Gabriel	11/10/1995	100001072430
7)	Arroyos, Andrea	8/22/1972	100001072346
8)	Avina, Christopher	1/9/1970	100001072517
9)	Baca, Antonia G	3/9/1935	100001072254
10)	Barela, Andrew	9/22/1970	100001073420
11)	Barela, Maria	11/23/1953	100001072146
12)	Bounds, Keith	3/2/1959	100001069065
13)	Brewer, Dora B	7/7/1937	100001073351
14)	Chavez, Matthew	12/26/1985	73
15)	Chavez, Sarah	9/13/1977	100001072868

The following clinic

Print

Show Inactive Charts

Export

Show Only if User is Principal

Assign Provi

Security Center

My Security Info

Change My Password

Please Note: Passwords must contain one letter and one number. The password should not be the same as the previous password.

Show

Fields used by electronic billing

Required Optional

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Service/Mod Codes

Lab Req Protocols

Meds Protocols

Provider Directory

Insur Payers

Therapy Groups

Formats

Therapy Groups

Filter

Name

X

+

1) Day Hab Lordsburg

X

2) DayHab Deming

X

3) Dayhab Silver City

X

4) Deming house meeting

X

5) Deming life skills group

X

6) Fridays

X

7) Interdisciplinary Silver City

X

8) Life Skills Group women

X

9) Life Skills Group (men)

X

10) Overcoming Obstacles Deming PM

X

Print All Groups

Sessions

1) 7/11/2023 Group Therapy Note

X

2) 7/8/2023 Group Therapy Note

X

3) 7/7/2023 Group Therapy Note

X

4) 7/6/2023 Group Therapy Note

X

5) 7/5/2023 Group Therapy Note

X

6) 7/4/2023 Group Therapy Note

X

Members

1) Cyrus, Sarah 10000107279 5/20/85

X

2) Griego, Christopher 100 1/5/98

X

3) Lopez, Henry 10000107382 8/20/62

X

4) McAllister, Mark 10000107349 1/25/76

X

5) Mudry, Crystal 10000106906 8/6/85

X

6) Porras, Jose 10000107180 3/21/68

X

7) Prevost, Michael 120 3/27/70

X

8) Sanders, Crystal 46 1/22/78

X

< Select a Roster >

Show

Fields used by electronic billing

Required Optional

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Chart Room

Settings & Directories

Specific to Individual

Group Le

Settings for Site

Sites/LetterheadsService/Mod CodesLab Req ProtocolsMeds ProtocolsProvider DirectoryInsur PayersTherapy GroupsFormats

Claim Templates

Clinician Reminder Rules

Custom Value Lists

MAR

Contact ICANotes Support at (443) 569-8778 if you want this feature turned on

☐ Filter by Site

☐ Filter by Clinician

< Select a Site >

< Select a Clinician >

Print

Deming	Daniella Ramirez, CPSW	X
Deming	Kathy Quarrell, CPSW	X
Deming	Lawren Davenport, CPSW	X
Deming	Veronica Diaz, CPSW	X
Deming- Men's Transitional	Daniella Ramirez, CPSW	X
Deming- Men's Transitional	Lawren Davenport, CPSW	X
Hidalgo Haven	Daniella Ramirez, CPSW	X
SOS	Daniella Ramirez, CPSW	X
SOS	Joy Leatherman, CPSW	X
SOS	Lawren Davenport, CPSW	X
SOS	Veronica Diaz, CPSW	X
SPIN Supporting People In Need	Daniella Ramirez, CPSW	X
SPIN Supporting People In Need	Jeffrey Finer, CPSW	X
SPIN Supporting People In Need	Joy Leatherman, CPSW	X
SPIN Supporting People In Need	Lawren Davenport, CPSW	X

Assign Clinicians to Sites where th
then when in Chart Room the Clinic

Pick a Site

< Select a Site >

Assign

Show

Fields used by electronic billing

Required Optional

[Sign Out](#) [Edit](#) [View](#) [Format](#) [Reports](#) [Chat/Help](#)

Chart Room

Last Chart

Calendar

Patients assigned to you are **highlighted**

Patient Records

Total Patient Count: 1458

Only Applies to New Patient Report

Applies to All & New Patient Reports

From: 7/11/2020

Site name:

To: 7/12/2023

Include: ☒ All Patients.
☐ Patients WITH treatment plans only.
☐ Patients WITHOUT treatment plans only.

Show All Patients

Show New Patients Added >>

Export

Print

	Patient Name	Unique ID	Last Exam	Clinician	Status
\$	Jasso, Vanessa	0001	10/16/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Juare, Alec	0002		Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Andazola, Ryan	1000010690420	6/17/2019	Christina Wolford, LCSW	<input type="radio"/> Active <input checked="" type="radio"/> Inactive <input type="radio"/> F
\$	Flores, Basilio	1000010690424	4/8/2019 12:00	Christina Wolford, LCSW	<input type="radio"/> Active <input checked="" type="radio"/> Inactive <input type="radio"/> F
\$	Lucero, James D	1000010690472	4/3/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Evans, Pete	1000010690473	1/22/2021	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Montes, Andrew	1000010690474	1/4/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Wolfe, Johannes	1000010690475	7/16/2021	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Bounds, Keith	1000010690653	3/13/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Beltran, David	1000010690654	11/16/2021	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Blakeney, Terri	1000010690655	2/11/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Arciero, Jocelyn	1000010690656		Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Mudry, Crystal	1000010690657	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Pendzik, Carrie	1000010690661	4/27/2022	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Avena-Imberton,	1000010690662	11/21/2022	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Sotelo, Maria	1000010690663	2/7/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Sanders, Carol	1000010690664	5/24/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Abreu, Ashley	1000010690665	3/2/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Rivera, John K	1000010690666	12/7/2021	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Sierra, Alexander	1000010690667	7/7/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Chavez, Danny	1000010690668	4/16/2019	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Grobl, L. Richard	1000010690669		Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Scott, Britton	1000010690670	5/17/2022	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Lay, Elizabeth	1000010690671	7/10/2019	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Madrid, Teresa	1000010690672	4/13/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Yadon, Toni	1000010690673		Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Castor, John	03	3/7/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Selva, Alexis	1000010690888	5/25/2021	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Michel, Toby	1000010690890	6/19/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Nunez, Diane	1000010690923	8/1/2022 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Swartz, Stanley	1000010690998	8/9/2021 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Miller, Janice	1000010690999		Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Rodriguez, Nadia	1000010691000	4/15/2019	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Rivers, Eric	1000010691001	2/24/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Glynn, George	1000010691002		Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F

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Chart Room

Last Chart

Calendar

Patients assigned to you are highlighted

Patient Records

Total Patient Count: 1458

Only Applies to New Patient Report

Applies to All & New Patient Reports

From: 7/11/2020

Site name:

To: 7/12/2023

Include: ☒ All Patients.
☐ Patients WITH treatment plans only.
☐ Patients WITHOUT treatment plans only.

Show All Patients

Show New Patients Added >>

Export

Print

	Patient Name	Unique ID	Last Exam	Clinician	Status
\$	Vanellen, Robert	1000010717961	3/31/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Theis, Sabrina	1000010717970	5/24/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Rodriguez, Yvonne	1000010717998	8/13/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Porras, Jose	1000010718034	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Bunyar, Jessica	1000010718065	3/11/2022	Michelle Grayless, MSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Cimazewski, Stanley	1000010718133	12/10/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Wells, Skye	1000010718134	8/20/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Stanphill, Virginia	1000010718194	5/10/2021	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Gonzales, Efrain	1000010718211	8/25/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Carreon, Alma	1000010718213	8/25/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Vaughn, Delia	1000010718231	8/11/2022	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Vannatter, Nicole S	1000010718235	4/19/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Lavigne, Gabrealla	1000010718265	11/30/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Hefley, William	1000010718280	2/5/2021 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Trzaskoma, Rey	1000010718282	8/27/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Ramirez, Daniella	1000010718315	2/16/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Price, Tiffany	1000010718334	10/8/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Hefley, William	1000010718340	9/10/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Hunter, Billy	1000010718358	10/28/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Hovey, Shad	1000010718373	1/6/2021 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Toth, Alex	1000010718375	9/23/2021	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Jacquez, Monique	1000010718378	9/2/2020 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Chavez, Armando	1000010718387	5/2/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Sievers, Bruce M	1000010718399	3/1/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Brannan, Billy O	1000010718447	6/13/2023	Michelle Grayless, MSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Grey, Delvin	1000010718487	5/10/2021	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Martinez, Cloe N	1000010718500	4/5/2021 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Palomarez, Daniel	1000010718573	5/1/2021 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Ruiz, Francesca	1000010718626	6/5/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Toomire, Joseph	1000010718642	4/16/2022	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Ludiker, Debra	1000010718645	10/19/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Mcleary, Daniel	1000010718654	9/15/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Ortega, Bernard	1000010718663	9/15/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Hart, James	1000010718737	10/19/2020	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F
\$	Almaraz, Jennifer	1000010718738	1/3/2022 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> F

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Chart Room Last Chart Calendar

Flagged Patients Report Number of Flagged Charts Found: 144

Search Inside Message for: X ☐ Priority Status: ☒ Active ☐ Inactive ☐ Pending X

Refresh Export Print

Chart Flag Message

1)	Abeyta, Jeremy 1000010739311 9/26/1974 Active	<input checked="" type="checkbox"/> Priority	Need diagnosis Needs a Treatment Plan Need soc sec, medicare card	QEnlarge	Char \$
2)	Abreu, Ashley 1000010690665 12/23/1987 Active	<input checked="" type="checkbox"/> Priority	Ms. Abreu insurance in no longer in effect.	QEnlarge	Char \$
3)	Acosta, Frederick 1000010717834 7/10/1992 Active	<input checked="" type="checkbox"/> Priority	ineligible insurance	QEnlarge	Char \$
4)	Aguilera, Andriisa 1000010739072 11/16/1997 Active	<input checked="" type="checkbox"/> Priority	Andriisa insurance in no longer in effect.	QEnlarge	Char \$
5)	Allen, Ronald 1000010737366 2/8/1959 Active	<input checked="" type="checkbox"/> Priority	Need ins card	QEnlarge	Char \$
6)	Alviso, Anthony R 1000010722298 1/7/1987 Active	<input checked="" type="checkbox"/> Priority	Needs Social Security Number	QEnlarge	Char \$
7)	Amaro, Fabian 1000010706447 10/27/1985 Active	<input checked="" type="checkbox"/> Priority	Needs Social Security Number	QEnlarge	Char \$
8)	Ayala, Jaime 24 12/8/1986 Active	<input checked="" type="checkbox"/> Priority	Needs a Treatment Plan Needs Assessment Completed Needs Diagnosis	QEnlarge	Char \$
9)	Baker, Charles M 1000010738651 5/6/1950 Active	<input checked="" type="checkbox"/> Priority	Needs Diagnosis	QEnlarge	Char \$
10)	Barrio, Ramon 67 1/23/1968 Active	<input checked="" type="checkbox"/> Priority	Needs SSN Needs a Treatment Plan	QEnlarge	Char \$
11)	Bastien, Joseph 1000010736477 8/17/1976 Active	<input checked="" type="checkbox"/> Priority	Needs docs	QEnlarge	Char \$
12)	Bierner, Brian 1000010738943 4/25/1975 Active	<input checked="" type="checkbox"/> Priority	Needs Assessment Completed Needs Diagnosis Needs a Treatment Plan	QEnlarge	Char \$
13)	Boroski, Deborah A 1000010731487 3/8/1963 Active	<input checked="" type="checkbox"/> Priority	Needs a Treatment Plan Needs Assessment Completed Needs Diagnosis	QEnlarge	Char \$
14)	Carr, Melody 1000010729833 4/6/1978 Active	<input checked="" type="checkbox"/> Priority	Needs Social Security Number Insurance Information Incorrect	QEnlarge	Char \$
15)	Castaneda, Priscilla —	—	Need docs	QEnlarge	Char

Sign Out Edit View Format Reports Chat/Help

Chart Room Last Chart Calendar

Flagged Patients Report

Number of Flagged Charts Found: 144

Search Inside Message for: X ☐ Priority Status: ☒ Active ☐ Inactive ☐ Pending X

Refresh Export Print

Chart Flag Message

1000010737307 12/10/1990 Active	<input checked="" type="checkbox"/> Priority				\$
30) Derby, Michelle 1000010739613 10/30/1984 Active	<input checked="" type="checkbox"/> Priority	Needs Diagnosis Needs Assessment Completed Needs a Treatment Plan	QEnlarge	Char	\$
31) Dridi, Hatem 1000010740080 8/15/1978 Active	<input type="checkbox"/> Priority	Needs Assessment Completed Needs Diagnosis Hatem insurance is currently needing to be verified.	QEnlarge	Char	\$
32) Duran, Veronica 1000010737616 10/26/1968 Active	<input checked="" type="checkbox"/> Priority	Needs diagnosis Needs DL, SS, ins card	QEnlarge	Char	\$
33) Egge, Benna 29 3/15/1981 Active	<input checked="" type="checkbox"/> Priority	Please get clients insurance information Needs a Treatment Plan	QEnlarge	Char	\$
34) Ellingwood, Daniel 1000010733763 10/4/1968 Active	<input type="checkbox"/> Priority	Need updated phone # -MMC	QEnlarge	Char	\$
35) Escobar, Gemma 1000010737761 6/6/1981 Active	<input checked="" type="checkbox"/> Priority	Need docs Need diagnosis Needs Assessment Completed	QEnlarge	Char	\$
36) Esparza, Delia 28 1/18/1990 Active	<input checked="" type="checkbox"/> Priority	Need ROI Need soc sec card Need assessments	QEnlarge	Char	\$
37) Farrias, Thomas 1000010734217 1/28/1972 Active	<input checked="" type="checkbox"/> Priority	Needs docs	QEnlarge	Char	\$
38) Fisher, Travis 1000010739985 7/22/1982 Active	<input checked="" type="checkbox"/> Priority	Needs Diagnosis Needs a Treatment Plan	QEnlarge	Char	\$
39) Flores, Cristine 1000010736895 3/1/1975 Active	<input checked="" type="checkbox"/> Priority	Needs a Treatment Plan	QEnlarge	Char	\$
40) Gonzales Flores, Francisco 23 2/3/2002 Active	<input type="checkbox"/> Priority	Needs a Treatment Plan	QEnlarge	Char	\$
41) Gallegos, Sandra C 1000010720590 8/13/1974 Active	<input checked="" type="checkbox"/> Priority	Ms. Gallego's insurance in no longer in effect.	QEnlarge	Char	\$
42) Garcia, Ernesto B 1000010735613 9/23/1961 Active	<input checked="" type="checkbox"/> Priority	needs Diagnosis	QEnlarge	Char	\$
43) Garcia, Steven 1000010736058 04/14/1980 Active	<input checked="" type="checkbox"/> Priority	Needs a Treatment Plan Needs Assessment Completed Needs Diagnosis	QEnlarge	Char	\$

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Find a Chart

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Ther. Groups

Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

This is the Chart Face for: Aguirre, Gabrielle

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Major depressive disorder, recurrent, unspecified, F33.9 (ICD-10) (Active)

Active Problem/Need List

Current Medications

Print List

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 10

1) 6/16/23

Treatment Plan (SPIN Supporting People)

SOS

TREATMENT PLAN FOR GABRIELLE AGUIRRE

A treatment plan was created or reviewed today, 6/16/2023, for

Diagnosis:

Major depressive disorder, recurrent, unspecified, F33.9 (IC

2) 6/16/23

Treatment Plan (SPIN Supporting People)

SPIN Suppo

People In N

TREATMENT PLAN FOR GABRIELLE AGUIRRE

A treatment plan was created or reviewed today, 6/16/2023, for Ga

Diagnosis:

Major depressive disorder, recurrent, unspecified, F33.9 (ICD

3) 6/12/23

Case Management Note (SPIN)

SOS

Presenting Problem:

Anxiety is still experienced by Gabrielle.

Client has a history of health problems that affect her physically a

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Aguirre, Gabrielle

Supp.

ED Visit

1 of 1

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ICANotes

Behavioral Health EHR

Find a Chart

Chart Room

Photo

Ther. Groups

Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

White, Michael

Supp.

ED Visit

This is the Chart Face for: White, Michael

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Major depressive disorder, recurrent severe without psychotic features, F33.2 (ICD-10) (Active)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

No Adverse Medication Reactions or Allergies/Intolerances on record

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

History of substance use

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 26

1) 7/11/23

Case Management Note (SOS)

SOS

Presenting Problem:

Michael continues to experience anxiety.

Michael continues to experience depression.

Michael continues to experience mood swings.

2) 7/10/23

Case Management Note (SOS)

SOS

Presenting Problem:

Anxiety is still experienced by Michael.

Mood swings continue.

3) 7/7/23

Case Management Note (SOS)

SOS

Presenting Problem:

Michael continues to experience anxiety.

Mood swings continue.

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

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Progress Note (select your specialty)

Prescriber

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Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Andazola, Karissa

Supp.

ED Visit

This is the Chart Face for: **Andazola, Karissa**

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)

Borderline personality disorder, F60.3 (ICD-10)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS: Mrs Ramrez wa raised in an abusive and addictive household. Both of her parents are and as far as she can remember, heroine

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 17

1) 4/17/23 CAW PHQ-9: Patient Health Questionnaire SOS

Form Title: PHQ-9: Patient Health Questionnaire

This custom form has been saved as a PDF.

You can view and print the custom form by previewing the compile OR by going to the Patient Documents under Patient Records.

2) 4/17/23 CAW GAD-7: Generalized Anxiety Disorder SOS

Form Title: GAD-7: Generalized Anxiety Disorder Screener

This custom form has been saved as a PDF.

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3) 4/14/23 Treatment Plan (SOS) SOS

TREATMENT PLAN FOR KARISSA ANDAZOLA

Treatment Plan

A Treatment Plan was created or reviewed today, 4/14/2023, for Ka

This was a Initial Treatment Team Meeting.

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

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575-956-6947

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4/14/2023
1:51 PM

Andazola, Karissa

ID: 1000010706932 DOB: 12/14/1993
Treatment Plan (SOS)

Service Location
Turn

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TREATMENT PLAN FOR KARISSA ANDAZOLA

Treatment Plan

A Treatment Plan was created or reviewed today, 4/14/2023, for Karissa Andazola. This was a Initial Treatment Team Meeting.

Diagnosis:

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Borderline personality disorder, F60.3 (ICD-10) (Active)
Major depressive disorder, recurrent, severe with psychotic symptoms, F33.3 (ICD-10) (Active)

Problems:

Problem #1: anxiety

Problem: ANXIETY

Ms. Ramirez's anxiety has been identified as an active problem in need of treatment. It is primarily manifested by:
Post Traumatic Stress Disorder - with efforts to avoid events, places, people or activities reminiscent or associated with the traumatic event.

Long Term Goal(s):

- Will reduce overall level, frequency, and intensity of anxiety so that daily functioning is not impaired.
- The ability of the patient to effectively handle the full variety of life's anxieties will be enhanced.

Target Date: 7/14/2023

Comprehensive Treatment Plan Barriers

Comprehensive Treatment Plan Strengths

Upon completion of Long Term Goal, Discharge or Transition Plan includes:

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Andazola, Karissa

ID: 1000010706932 DOB: 12/14/1993

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1:45 PM

Service Location

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Complete Evaluation / Biopsychosocial Assessment

LCSW

HISTORY: Ms. Ramirez is a Hispanic or Latino 29-year-old woman. Her chief complaint is, "anxiety and depression" due to increased stress levels.

History:

Ms. Ramirez is exhibiting symptoms of a post traumatic stress disorder. She is having increased trouble enjoying her leisure time and activities.

Information Received From:

Ms. Ramirez
Ms. Ramirez's Family
A Professional Source

Onset: Her symptoms are chronic and have been present for three months or more.

Precipitating Trauma: She experienced a violent personal assault. Details are as follows: She witnessed an act of violence. Details are as follows:

Symptoms:

She has trouble concentrating. Efforts are taken to avoid reminders of the traumatic event. Intense distress occurs when she is reminded of the trauma. Hypervigilance is evident. Irritability and other hyperarousal symptoms continue. Feelings of isolation are reported.

Interference with Functioning:

Symptoms interfere with Ms. Ramirez's social functioning. Symptoms interfere with Ms. Ramirez's occupational functioning.

Severity/Complexity:

Severity is estimated to be medium based on Ms. Ramirez's risk of morbidity without treatment and her description of interference with functioning.

CURRENT STRESSORS:

Serious problems at work are reported. Her emotional state has affected her work.

PERTINENT NEGATIVES:

Ms. Ramirez denies any chemical dependency problems.
She denies hallucinations, delusions, and all other symptoms of psychotic process.
She specifically denies manic symptoms.
Ms. Ramirez denies any symptoms suggestive of dementia.
Symptoms of ADHD are denied.

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10/6/2022
6:43 PM

Ramirez, Karissa

ID: 1000010706932
DOB: 12/14/1993

Group Therapy Note (SOS)

Session Remarks:

Group Type:

Focus Group: Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention.

Present Today:

Present at today's session were the following:
Only two members of the group were present today.

Group Leader Interventions:

Group Leader facilitated discussion about
Encouraged exploration
Extrapolated to Life
Involved all Group
Kept Group Focused

Plan:

Continue group.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Borderline personality disorder, F60.3 (ICD-10) (Active)
Major depressive disorder, recurrent, severe with psychotic symptoms, F33.3 (ICD-10) (Active)

HEALTH CONCERNS AND RISKS:
Mrs Ramirez was raised in an abusive and addictive household. Both of her parents are and as far as she can remember, heroin addicts. Her father is a meth addict currently and the status of her mother unknown
Time spent face to face with patient and/or family and coordination of care: 75 min.

Session start: 3:45 PM
Session end: 5:00 PM

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Men's Transitional House Silver City
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575-956-6242
575-956-6947

Ramirez, Karissa

ID: 1000010706932 DOB: 12/14/1993

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4/19/2021

12:19 PM

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Case Management Note

Presenting Problem:

Symptoms of depression continue to be described.
Ms. Ramirez continues to experience mood swings.
Ms. Ramirez continues to experience symptoms of psychotic process.

An application was completed for disability.
Karissa reports feelings of extreme anger and rage. She has had seizures recently. She has been having extreme depression Ms. Ramirez presents as downcast, Ms. Ramirez presents as irritable, attentive, communicative, casually groomed, over weight, and looks unhappy. There are signs of severe depression. Body posture and attitude convey an underlying depressed mood. Facial expression and general demeanor reveal depressed mood. Psychotic or borderline psychotic symptoms seem to be present. Her reasoning is illogical. Wishes to be dead have been occurring but suicidal intentions are denied. Insight into problems appears to be poor. Judgment appears to be poor. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Ms. Ramirez's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

BEHAVIOR:

Medication has not been regularly taken. She depends on others to help perform self care. She reports the feeling that the performance of domestic tasks has to be forced and are performed with difficulty. She is having to force self to socialize with others. More angry outbursts are occurring. Impulsive behaviors continue to be displayed. Ms. Ramirez has increased food and fluid intake. Ms. Ramirez is sometimes confused. Sleep problems are reported.

CONTENT OF THERAPY:

This session the focus was on the problem of coping with depression. Problems in the family were also discussed by the patient. Interpersonal problems were also discussed by the patient. The problem of low frustration tolerance was also discussed. Feelings of low self esteem were also discussed in this therapy session. Apprehensions about panic attacks were also discussed in today's session. Self defeating problems were also discussed. Ms. Ramirez also expressed many angry feelings.

THERAPEUTIC INTERVENTION:

Instructions were given regarding ways to facilitate communication of feelings. This session the therapeutic focus was, in part, on helping to clarify areas of difficulty and to develop coping skills and to manage stress. The main therapeutic techniques used this session were supportive. The patient was also encouraged to ventilate feelings.
Time spent face to face with patient and/or family and coordination of care: 120 min

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Ramirez, Karissa

5/19/2020

5:08 PM

ID: 1000010706932 DOB: 12/14/1993

Progress Note (Non-Rx)

Compliance with medication is good. Her self care skills are impaired and she depends on others to perform them. Her ability to do domestic tasks is impaired and she is dependent on others. Her relationships with family and friends have ceased. There are no early sigMs. Ramirez has had no apparent response to treatment yet.

Ms. Ramirez exhibits symptoms of borderline personality disorder, characterized by pervasive instability in moods, behavior, and interpersonal relationships.

Ms. Ramirez reports a marked and persistent identity disturbance is present and are manifested by uncertainty in areas of her life. She describes a sudden and dramatic shift in her self-image. Ms. Ramirez experiences her instability of self-image as chronic feelings of emptiness or boredom. She has great difficulty tolerating being alone. Ms. Ramirez makes frantic efforts to avoid real or imagined abandonment.

BEHAVIOR: ns of substance abuse relapse and sobriety has been maintained. More anger has been displayed. There have been continued instances of impulsive behaviors. Ms. Ramirez has normal food and fluid intake. Ms. Ramirez is sometimes confused. Complete inability to fall asleep last night is reported.

MENTAL STATUS EXAM: Ms. Ramirez appears friendly, guarded, distracted, communicative, casually groomed, over weight, but looks unhappy. Mood presents as normal with no signs of either depression or mood elevation. The patient convincingly denies suicidal ideas or intentions. Homicidal ideas or intentions are denied. Insight into problems appears fair. Judgment appears fair. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Ms. Ramirez's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Borderline personality disorder, F60.3 (ICD-10) (Active)
Major depressive disorder, recurrent, severe with psychotic symptoms, F33.3 (ICD-10) (Active)
Time spent face to face with patient and/or family and coordination of care: 53-67 min

Timothy Hamilton, LMSW
(Note Compiled by: Michelle Grayless, MSW)

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Ramirez, Karissa

4/15/2020 11:44 AM

ID: 1000010706932 DOB: 12/14/1993

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Progress Note (Non-Rx)

Karissa's husband works in the mine that has workers that have tested positive for the virus. She is panicking. She report having a seizure and was grateful that her husband was near. Karissa reports that she did not go the hospital. She also spoke about previous jobs and being fired from McDonald's because she had a seizure while working. She reports that once employers find out she is epileptic, which is often because she has an episode, she is let go as a liability.

BEHAVIOR:
Good medication compliance is noted. Her self care is reduced and less attention is being paid to these tasks. Her domestic skills are intact within the home, but needs assistance outside the home due to extreme anxiety. She is socially isolated. Her functioning at work is impaired. She has maintained sobriety. Some anger has been displayed. Impulsive behaviors are not currently being displayed. Ms. Ramirez has not been confused.

CONTENT OF THERAPY:
The patient today spoke mainly about issues involving coping with depression. Family problems were also discussed. Feelings of anxiety were also expressed.

THERAPEUTIC INTERVENTION:
Instructions were given regarding ways to facilitate communication of feelings. This session the therapeutic focus was, in part, on helping to clarify areas of difficulty and to develop coping skills and to manage stress. The main therapeutic techniques used this session were supportive. Encouragement to ventilate feelings was also given to the patient.

MENTAL STATUS EXAM: Ms. Ramirez appears guarded, downcast, inattentive, minimally communicative, disheveled, over weight, and tense. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. There are signs of severe depression. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. The patient convincingly denies suicidal ideas or intentions. Homicidal ideas or intentions are denied. Vocabulary and fund of knowledge indicate cognitive functioning in the normal range. Insight into problems appears fair. Judgment appears fair. There are signs of anxiety. She is easily distracted. No signs of withdrawal or intoxication are in evidence.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Borderline personality disorder, F60.3 (ICD-10) (Active)

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2/8/2023
12:43 PM

Medicaid ID: YIF915110351

Pearce, Amber N

ID: 1000010729422 DOB: 4/26/1997

Progress Note (Non-Rx) (SPIN Supporting People In Need)

Amber's behavior in the session was cooperative and attentive with no gross behavioral abnormalities. I assisted client this afternoon with washing and drying her bedding after it was all done all of it was returned to her in which she then put it all back in her area she was assisted by t s

MENTAL STATUS EXAM:

Amber's mental status has no gross abnormalities. Her dress and grooming are appropriate, she is friendly and communicative, and she appears to be her stated age. Mood is euthymic with no signs of depression or manic process. Her speech is normal in rate, volume, and articulation and language skills are intact. Suicidal or self injurious ideas or impulses are denied, as are assaultive or homicidal ideas or intentions. She denies hallucinations and delusions and there is no apparent thought disorder. Associations are intact, thinking is generally logical, and thought content is appropriate. Her cognitive functioning, based on vocabulary and fund of knowledge, is intact and age appropriate, and she is fully oriented. There are no signs of anxiety. There are no signs of attentional or hyperactive difficulties. Insight and judgment appear intact.

MEDICAL HISTORY: Amber recently experienced swelling to her face . She denied medical care. She was given a Benadryl and the symptoms subsided.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Major depressive disorder, recurrent severe without psychotic features, F33.2 (ICD-10) (Active)
Bipolar disorder, current episode depressed, moderate, F31.32 (ICD-10) (Active)
Anxiety disorder, unspecified, F41.9 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

LEVEL OF CARE JUSTIFICATION:
Amber continues to need outpatient treatment. She continues to exhibit symptoms of an emotional disorder that interfere with day to day functioning and requires continued treatment.

HEALTH CONCERNS AND RISKS:

H0038 Peer Support

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McAllister, Mark

ID: 1000010734998 DOB: 1/25/1976
Group Therapy Note (SOS)

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7/11/2023

3:17 PM

Time spent face to face with patient and/or family and coordination of care: 180 min
Session start: 11:00 AM
Session end: 2:00 PM

Session Remarks: This group was facilitated by Candice Owens

Therapy Type:
Dialectical Behavior Therapy (DBT)

Group Type:
Focus Group: Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention. The focus of today's group was the concept of social skills. The purpose was to familiarize the group members with certain techniques and skills needed to establish and maintain healthy relationships. Group members were encouraged to share life experiences that illustrated the use of those skills.

In todays session we are focusing on communication skills. As a social experiment we went bowling as a group. Each client was encouraged to communicate with other clients and other members of the community. The clients stayed engaged and participated the whole activity.

Present Today:
Present at today's session were the following:
Ten members of the group were present today.

Group Leader Interventions:
Kept Group Focused

Plan:
Continue group.
Encourage increased attendance.
Encourage increased participation.

The intention of the group is to teach life skills and reduce symptoms of anxiety and depression.

Individual Remarks:

Appearance and Behavior:
In today's session Mark appeared friendly, minimally communicative, and relaxed

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McAllister, Mark

ID: 1000010734998 DOB: 1/25/1976

Use Note Creation Time

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4/17/2023

11:07 AM

Progress Note (Non-Rx) (SOS)

CLINICAL STATUS:

Mark presents as stable. No psychiatric complaints are today expressed. Improvement is today apparent.

RECENT HISTORY:

Continued anxiety-related symptoms are reported by Mark. Those anxiety-related symptoms are today described as unchanged. Mark is experiencing chronic homelessness, he has been residing in motel rooms since being evicted from his last home within the year. Mark is searching for suitable housing but not having luck securing. Mark is working on his recovery, and is struggling to maintain sobriety. Mark is impaired in the functional domains of independent living, socializing and recreation.

BEHAVIOR:

Compliance with medication is irregular. Self-care skills are intact and unimpaired. His ability to do domestic tasks is impaired and assistance is needed. He is having to force self to perform domestic tasks. He is socially isolated. He marginally functions at work. Substance use has not increased and is not excessive. His anger is partially controlled. There have been fewer instances of impulsive behaviors, but some are still occurring. Mark's food and water intake is normal. Mark is sometimes confused. Mark has difficulty falling asleep.

VERBAL CONTENT OF SESSION:

Mark discussed problems he is having at work in today's session. Mark was provided emotional support as he vented about changes to his work schedule with current employment. Mark is upset and asked open ended questions to assess the current situation and get a better understanding of why his hours have been shortened at work. Mark is worried about being able to transition into suitable housing without the income. Mark is working through interpersonal changes he has been experiencing, he is also planning on looking for another job opportunity part-time. Mark will be continued to be met with.

THERAPEUTIC INTERVENTIONS:

Mark was encouraged today to ventilate his feelings. The sources of certain of his feelings were explored with Mark, using open-ended questions, reflection, and rephrasing. Used Motivational Interviewing to explore the situation.

MENTAL STATUS EXAM:

Mark appears downcast, attentive, communicative, well groomed, and anxious. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Signs of mild depression are present. He appears downcast. There were no signs of psychotic symptoms this session. He denies having suicidal ideas. Homicidal ideas or intentions are denied. Cognitive functioning and fund of knowledge are intact and age appropriate. Short- and long-term memory are intact, as is ability to abstract and do arithmetic calculations. This patient is fully oriented. Vocabulary and fund of knowledge indicate cognitive functioning in the normal range. Insight into

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575-956-6131
575-956-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970
Case Management Note (SOS)

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7/11/2023

8:41 PM

Service Location
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Presenting Problem:
Ms. Lazzell continues to experience anxiety.
Depressive symptoms continue.

Recent History:
Client has a history of chronic homelessness, unemployment, substance abuse, anxiety, depression, paranoid schizophrenia, and hallucinations.

Social Support Changes:
No changes in Ms. Lazzell's family or social support network have occurred.

Intervention:
Client was assisted with her nightly medications in order to help keep her stable.

Assessment:
Ms. Lazzell presents as calm, Ms. Lazzell appears friendly, minimally communicative, but tense. It is not possible to determine if underlying psychotic symptoms are present. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Ms. Lazzell's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue assisting client as needed and prompt client to participate in programming plans.

1 Unit for H2015 Comprehensive Community Support Services - UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 8:00 PM
Session end: 8:15 PM

T.Y

Joy Leatherman, CPSW

Electronically Signed
By: Joy Leatherman, CPSW
On: 7/11/2023 8:41:35 PM

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7/12/23, 4:44 AM

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Show Notes in List

SOS

610 N. Silver St

Silver City, NM 88061

575-956-6131

575-956-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970

Case Management Note (SOS)

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7/10/2023

7:52 PM

Service Location

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Presenting Problem:

Anxiety is still experienced by Ms. Lazzell.

Ms. Lazzell continues to experience depression.

Recent History:

Client has a history of chronic homelessness, unemployment, substance abuse, anxiety, depression, paranoid schizophrenia, and hallucinations.

Social Support Changes:

No changes in Ms. Lazzell's family or social support network have occurred.

Intervention:

Client was assisted with her nightly medications in order to help keep her stable.

Assessment:

Ms. Lazzell appears downcast, uncommunicative, and looks unhappy. Her speech cannot be tested. Mood cannot be assessed. It is not possible to determine if underlying psychotic symptoms are present. There are signs of anxiety. Ms. Lazzell made poor eye contact during the examination.

Plan:

Continue assisting client to the best of shelter abilities.

Diagnosis: Paranoid schizophrenia, F20.0 (ICD-10) (Active)

Sheltered homelessness, Z59.01 (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse

*History of Mental Illness:

Carries a Diagnosis of Manic Depressive Illness

Carries a Diagnosis of Schizophrenia

History of Severe Anxiety or Panic Attacks

Current Risk Factors:

*Absent or Weak Support System:

*Experiencing Severe Anxiety or Panic

*A Major Depression is Present

*Rapid Shifts in Mood are Occurring

*Carries a Diagnosis of Schizophrenia

Suicide Risk Assessment:

She denies suicidal ideas or intentions

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Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/9/2023

8:24 PM

Service Location

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Presenting Problem:
She continues to experience symptoms of anxiety.
Ms. Lazzell continues to experience depression.

Recent History:
Client has a history of chronic homelessness, unemployment, substance abuse, anxiety, depression, paranoid schizophrenia, and hallucinations.

Social Support Changes:
No changes in Ms. Lazzell's family or social support network have occurred.

Intervention:
Client was assisted with her nightly medications in order to help keep her stable.

Assessment:
Ms. Lazzell appears flat, minimally communicative, and tense. It is not possible to determine if underlying psychotic symptoms are present. There are signs of anxiety. Ms. Lazzell made poor eye contact during the examination.

Plan:
Continue assisting client in the future.

Diagnosis: Paranoid schizophrenia, F20.0 (ICD-10) (Active)
Sheltered homelessness, Z59.01 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Manic Depressive Illness
Carries a Diagnosis of Schizophrenia
History of Severe Anxiety or Panic Attacks

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*A Major Depression is Present
*Rapid Shifts in Mood are Occurring
*Carries a Diagnosis of Schizophrenia

Suicide Risk Assessment:
Ms. Lazzell denies suicidal ideas or intentions.

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Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970

Use Note Creation Time

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Set Date/Time

7/9/2023
11:22 AM

Case Management Note (SOS)

Presenting Problem:
Anxiety is still experienced by Ms. Lazzell.
Ms. Lazzell continues to experience mood swings.
Symptoms of psychosis continue to be described.

Recent history ;

Client has a history of reoccurring homelessness, unemployment, substance and alcohol abuse. Struggles with anxiety, depression, paranoid schizophrenia.

Social Support Changes:
No changes in Ms. Lazzell's family or social support network have occurred.

Case Management Services for Ms. Lazzell were provided today as follows: CCSS services provided, staff inquired if client would like to take her morning medication. Shanti refused, and staff pressed, asking if she was sure. When denied again, staff prompted her that it would be good for her to continue taking them regularly, but would be lenient with her this time around.

Assessment ;

Ms. Lazzell appears calm, friendly, attentive, minimally communicative, well groomed, normal weight, and relaxed. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis ;

Paranoid schizophrenia, F20.0 (ICD-10) (Active)
Sheltered homelessness, Z59.01 (ICD-10) (Active)

History of Risk Factors:
*History of Abuse:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Manic Depressive Illness
History of Severe Anxiety or Panic Attacks

Service Location

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7/12/23, 4:47 AM

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SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970
Case Management Note (SOS)

Use Note Creation Time

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Set Date/Time

7/8/2023

9:41 PM

Presenting Problem:
Ms. Lazzell continues to experience anxiety.
Ms. Lazzell continues to experience depression.
Recent History:
Client has a history of chronic homelessness, unemployment, substance abuse, anxiety, depression, paranoid schizophrenia, and hallucinations.
Social Support Changes:
Ms. Lazzell's family or social support network has occurred no changes.
Intervention:
Client was assisted with her nightly medications in order to help keep her stable.
Assessment:
Ms. Lazzell appears friendly, minimally communicative, Her speech cannot be tested. It is not possible to determine if underlying psychotic symptoms are present. There are signs of anxiety. Ms. Lazzell is restless. Ms. Lazzell's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.
Plan:
Continue accommodating client to the best of shelter abilities.

Diagnosis: Paranoid schizophrenia, F20.0 (ICD-10) (Active)
Sheltered homelessness, Z59.01 (ICD-10) (Active)
History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Manic Depressive Illness
Carries a Diagnosis of Schizophrenia
History of Severe Anxiety or Panic Attacks
Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*A Major Depression is Present
*Rapid Shifts in Mood are Occurring
*Carries a Diagnosis of Schizophrenia
Suicide Risk Assessment:
Ms. Lazzell denies suicidal ideas or intentions

Service Location
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Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/8/2023

10:28 AM

Service Location
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Presenting Problem:
Anxiety is still experienced by Ms. Lazzell.
Mood swings continue.

Recent History: Client has a history of chronic homelessness, unemployment, anxiety, depression, stress, hallucinations, psychosis, substance use, poverty.

Social Support Changes:
Ms. Lazzell's family or social support network has occurred no changes.

Case Management Services for Ms. Lazzell were provided today as follows:
-Provided client with her morning medications today.

Assessment:
Ms. Lazzell presents as flat, Ms. Lazzell presents as irritable, distracted, disheveled, and slow to respond. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Paranoid schizophrenia, F20.0 (ICD-10) (Active)
Sheltered homelessness, Z59.01 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Anger Management Problems

Current Risk Factors:
*Experiencing Severe Anxiety or Panic
*Describes Command Hallucinations, details are as follows:
*A Major Depression is Present
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present:
Affect Flat or Blunted
*Impaired Impulse Control
*Severe Insomnia is Present
*SeriouS Current Medical Problems
*Exhibits Psychotic Symptoms:
Command Hallucinations are Present

Suicide Risk:

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7/12/23, 4:48 AM

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Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970

Use Note Creation Time

Clear Time

Set Date/Time

7/7/2023
8:37 PM

Case Management Note (SOS)

Presenting Problem:
Ms. Lazzell continues to experience anxiety.
Symptoms of depression continue to be described.

Recent History:
Client has a history of chronic homelessness, unemployment, substance abuse, anxiety, depression, paranoid schizophrenia, hallucinations.

Social Support Changes:
No changes in her family or social support network have occurred.

Intervention:
Client was assisted with her medications in order to help keep her stable.

Assessment:
Ms. Lazzell appears flat, minimally communicative, Her speech cannot be tested. Mood cannot be assessed. It is not possible to determine if underlying psychotic symptoms are present. There are signs of anxiety. Ms. Lazzell is restless. Ms. Lazzell made poor eye contact during the examination.

Plan:
Continue assisting client as needed.

Diagnosis: Paranoid schizophrenia, F20.0 (ICD-10) (Active)
Sheltered homelessness, Z59.01 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Manic Depressive Illness
Carries a Diagnosis of Schizophrenia
History of Severe Anxiety or Panic Attacks

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*A Major Depression is Present
*Rapid Shifts in Mood are Occurring
*Carries a Diagnosis of Schizophrenia

Suicide Risk Assessment:
Ms. Lazzell denies suicidal ideas or intentions

Service Location

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7/12/23, 4:49 AM

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Photo

Chart Details

Dominant Patient's

[Go to E-Prescribe](#)

Demographics

Anaphylactic Reaction Reported ☐

Patient Information		Insurance Information	
*Name (F,M,L,Suffix)	Ernesto Dominguez	*Date of Birth	11/12/1997
<input type="checkbox"/> Homeless	Address 212 S Copper ST	Unique Patient ID	1000010717476
<input type="checkbox"/> Bad Address	Addr 2 / Appt #	*Gender	boy
<input type="checkbox"/> Sample Chart	City, State, Zip Deming NM 88030	Refer to patient as	Mr. Dominguez
Best Phone	Home Phone	SSN #	648-14-0091
<input type="radio"/> Home	Cell Phone	Alt. Patient ID	
<input type="radio"/> Work	Work Phone	Other Names	
<input type="radio"/> Cell	Email	Previous Address	
Patient Status <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		Patient's Condition Date Of Current Illness Onset Date of Current Admission: From Dates Unable To Work: From Condition Related To Employment? Condition Related To Auto Accident? Condition Related To Other Accident? In treatment Previously? <input type="radio"/> Y <input type="radio"/> N If yes, when Date Of Death Preliminary Cause	
API Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message Employment Status School or Employer Grade Marital Status Sexual Orientation *Ethnicity Hispanic or Latino Ethnicity 2 Religion Annual Household Income Family Size Veteran <input type="radio"/> Y <input type="radio"/> N *Race White Race 2 *Preferred Language Disability Native American <input type="radio"/> Y <input type="radio"/> N Tribal Affiliation		Birth Order Multiple Birth Release of Info Patient Calendar Note	
Assigned Providers are allowed to sign Notes for this Patient		Where Seen Deming Add New Location	

Red fields are required **Blue fields are optional but add info to clinical note.**

* = Required for Meaningful Use ✓ = Patient Has Accessed Portal

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Fields used by elec

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Show Notes in List

Men's Transitional Home- Deming
416 S. Silver St
Deming, NM 88030

575-936-4177
575-936-4251

Use Note Creation Time

Clear Time

Set Date/Time

Dominguez, Ernesto

7/14/2023
10:09 AM

ID: 1000010717476 DOB: 11/12/1997

Progress Note (Non-Rx) (Deming- Men's Transitional Home)

Presenting Problem:
Today client came to me with issues of losing his home, and also maybe having a child that he did not know he may have and how to go about getting paternity tests.

CLINICAL STATUS:
Mr. Dominguez today presents as improved. Mr. Dominguez has had a minimal response to treatment.

RECENT HISTORY:
Regarding Substance Problems:
Mr. Dominguez denies experiencing dysphoric moods. Episodes of unusual fatigue are denied. Mr. Dominguez reports no sleep disturbance. Mr. Dominguez describes substance cravings. Mr. Dominguez admits he was tempted to use. Mr. Dominguez did use. Mr. Dominguez reports not attending any recent meetings.

BEHAVIOR:
Medication has been taken regularly. His self care skills are reduced and less attention is being paid to grooming. His domestic skills are intact. He is socializing less with family and friends. There are early signs of substance abuse problems as current use has increased to an amount greater than advised. His anger is partially controlled. There have been fewer instances of impulsive behaviors, but some are still occurring. Mr. Dominguez's food and water intake is normal. Mr. Dominguez is not confused.

THERAPEUTIC INTERVENTIONS:
Used active listening and reframing to build rapport. Used Motivational Interviewing to explore the situation. In today's session, a goal for Mr. Dominguez was to build communication skills. This session, Mr. Dominguez was given emotional support, structure, and unconditional positive regard.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Schizoaffective disorder, depressive type, F25.1 (ICD-10) (Active)
Post-traumatic stress disorder, unspecified, F43.10 (ICD-10) (Active)
Other stimulant dependence with intoxication, unspecified, F15.229 (ICD-10) (Active)
Homelessness unspecified, Z59.00 (ICD-10) (Active)
Problems related to other legal circumstances, Z65.3 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

Service Location
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Men's Transitional Home- Deming
416 S. Silver St
Deming, NM 88030

575-936-4177
575-936-4251

Use Note Creation Time

Clear Time

Set Date/Time

Dominguez, Ernesto

6/7/2023 10:46 PM

ID: 1000010717476 DOB: 11/12/1997

Treatment Plan (Deming- Men's Transitional Home)

TREATMENT PLAN FOR ERNESTO DOMINGUEZ
A treatment plan was created or reviewed today, 6/7/2023, for Ernesto Dominguez.
Meeting Start: 12:00 PM - Meeting End: 1:00 PM
This was a Initial Treatment Team Meeting.

Participant(s) Developing the Plan:
Patricia Perez, CPSW (Peer Support)

Diagnosis:
Schizoaffective disorder, depressive type, F25.1 (ICD-10) (Active)
Post-traumatic stress disorder, unspecified, F43.10 (ICD-10) (Active)
Other stimulant dependence with intoxication, unspecified, F15.229 (ICD-10) (Active)
Homelessness unspecified, Z59.00 (ICD-10) (Active)
Problems related to other legal circumstances, Z65.3 (ICD-10) (Active)

Current Medications:

PROBLEM / NEEDS:
Problem / Need # 1: Housing/Living Environment Deficiency

Problem / Need: HOUSING/LIVING ENVIRONMENT DEFICIENCY

PROBLEM: Housing/Living Environment Deficiency
Mr. Dominguez's housing/living environment deficiency is an active need that affects his recovery environment and requires intervention. It is primarily manifested by:
Homelessness: Details as follows
*Living "On the Street"
*Due to Mental Illness

LONG TERM GOAL:
Mr. Dominguez develop sufficient budgeting skills to be able to resume independent living.
Target Date: 8/7/2023

SHORT TERM GOAL(S) & INTERVENTIONS:
Short Term Goal / Objective:
Mr. Dominguez will explore housing options given financial situation and level of need.
Progress: Working on
Status: Effective

Service Location
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Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Vannatter, Nicole S

Supp.

ED Visit

This is the Chart Face for: Vannatter, Nicole S

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Schizoaffective disorder, bipolar type, F25.0 (ICD-10) (Active)

Extreme poverty, Z59.5 (ICD-10) (Active)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS: History of abuse and substance abuse

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

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Showing 15

1) 4/19/23

Complete Evaluation / Complete

SOS

Unfinished Note

2) 3/25/23

Progress Note (Non-Rx) (SOS)

SOS

Presenting Problems: Depression, anxiety, difficulty regulating emotions

Recent History: Client has a history of chronic homelessness, unemployment

Intervention: Used open ended questions to assess how to help Nicole

3) 3/24/23

Progress Note (Non-Rx) (SOS)

SOS

presenting Problem: Nicole presented in person with symptoms of

RECENT HISTORY:

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

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Behavioral Health EHR

Continue

Photo

Chart Details

Vanna Patient

Demographics

Anaphylactic Reaction Reported ☐

Patient Information

*Name (F,M,L,Suffix) **Nicole S Vannatter**

☐ Homeless Address **717 Reynolds Circle**

☐ Bad Address Addr 2 / Appt #

☐ Sample Chart City, State, Zip **Silver City NM 88061**

Best Phone Home Phone Country **US**

☐ Home Cell Phone **(575)574-0734**

☐ Work Work Phone ext

☐ Cell Email

Patient Status

☒ Active

☐ Inactive

☐ Pending

API ☐

Appt Reminders via: ☐ Email ☐ Text Message ☐ Phone Message

Employment Status

School or Employer

Grade

Marital Status

Sexual Orientation

*Ethnicity **Hispanic or Latino**

Ethnicity 2 **more**

Religion

Annual Household Income

Family Size

Veteran ☐ Y ☐ N

*Race **White**

Race 2

*Preferred Language

Disability

Native American ☐ Y ☐ N Tribal Affiliation

Insurance Information

*Date of Birth **5/23/1995**

Unique Patient ID **1000010718235**

*Gender **woman**

Refer to patient as **Nicole**

SSN # **649-05-9459**

Alt. Patient ID

Other Names

Previous Address

Patient's Condition

Date Of Current Illness Onset

Date of Current Admission: From

Dates Unable To Work: From

Condition Related To Employment? ☐

Condition Related To Auto Accident? ☐

Condition Related To Other Accident? ☐

In treatment Previously? ☐ Y ☐ N If yes, whe

Date Of Death Preliminary Car

Release of Info

Patient Calendar Note

Assigned Providers

Daniella Ramirez, CPSW Role X **Principal**

are allowed to sign Notes for this Patient

< Select a Clinician >

< Multiple Clinicians >

Assign Provider(s)

Where Seen

Med Rec

SPIN Supporting

Add New Location

Show

Fields used by elec

Red fields are required Blue fields are optional but add info to clinical note.

*** = Required for Meaningful Use**

✓ = Patient Has Accessed Portal

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Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061
575-956-6131
575-956-6947
Medicaid ID: YIF915068089

Use Note Creation Time
Clear Time
Set Date/Time

3/25/2023

Vannatter, Nicole S

ID: 1000010718235 DOB: 5/23/1995

Progress Note (Non-Rx) (SOS)

Presenting Problems: Depression, anxiety, difficulty regulating emotions.
Recent History: Client has a history of chronic homelessness, unemployment, impaired ability to socialize.
Intervention: Used open ended questions to assess how to help Nicole. Used Motivational Interviewing to learn more about her goals.
Assessment: Client responded well. She was able to be assisted. Client asked if she could trade clothes for some new ones from the laundry room. I coached client in accessing the laundry room but she didn't find anything she wanted.
Plan: Continue providing emotional support to the client as she attempts to navigate life in the shelter.
Diagnosis: Schizoaffective disorder, bipolar type, F25.0 (ICD-10) (Active)
DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.
Schizoaffective disorder, bipolar type, F25.0 (ICD-10) (Active)
INSTRUCTIONS / RECOMMENDATIONS / PLAN:
LEVEL OF CARE JUSTIFICATION:
Nicole continues to need outpatient treatment. She continues to exhibit symptoms of an emotional disorder that interfere with day to day functioning and requires continued treatment.
HEALTH CONCERNS AND RISKS:
2 Unit for H0038 Peer Support
Time spent face to face counseling patient and/or family: 30 min
Session start: 1:00 PM
Session end: 1:30 PM
Tomas Sandoval CPSW

Service Location
Turn

Audit Log
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Print
Print Preview

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Chart Room
Chart Face
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<- prev
next ->

Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061
575-956-6131
575-956-6947
Medicaid ID: YIF915068089

Vannatter, Nicole S

ID: 1000010718235 DOB: 5/23/1995

Use Note Creation Time
Clear Time
Set Date/Time
3/24/2023

Service Location
Turn

Audit Log
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Copy complete note into

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Print Preview

Progress Note (Non-Rx) (SOS)

Presenting Problems: Anxiety, Aggression

Recent History: Client has a history of chronic homelessness, unemployment, anxiety, depression, mood fluctuations, and aggression

Intervention: Clarified to client that she could not change clothes outside. Then had to deescalate client when she began to become aggressive.

Assessment: Client began to escalate after she was told she could not change outside and I had to deescalate her. She took a breather then apologized.

Plan: Continue to engage client in hopes she will learn how to set proper boundaries.

Diagnoses: Schizoaffective disorder, bipolar type, F25.0 (ICD-10) (Active)

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Schizoaffective disorder, bipolar type, F25.0 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

LEVEL OF CARE JUSTIFICATION:
Nicole continues to need outpatient treatment. She continues to exhibit symptoms of an emotional disorder that interfere with day to day functioning and requires continued treatment.

HEALTH CONCERNS AND RISKS:

1 Unit for H0038 Peer Support -

Time spent face to face counseling patient and/or family: 15 min

Session start: 10:00 AM
Session end: 10:15 AM

Tomas Sandoval, CPSW

Electronically Signed
Rv: Tomas Sandoval CPSW

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Find a Chart

Chart Room

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Ther. Groups

Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Ramirez, Daniella

Supp.

ED Visit

This is the Chart Face for: Ramirez, Daniella

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Post-traumatic stress disorder, unspecified, F43.10 (ICD-10) (Active)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 24

1) 2/16/23 MG

Progress Note (Deming)

Deming

Ms. Ramirez's behavior has been stable and uneventful and she c symptoms. She reports no side effects and none are in evidence. Symptoms/Associated Signs and Symptoms: Psychotic, depress

MENTAL STATUS EXAM: Mood is euthymic with no signs of depre

2) 2/9/23 CAW

Records Release Authorization

SOS

Form Title: Records Release Authorization

This custom form has been saved as a PDF.

You can view and print the custom form by previewing the compile OR by going to the Patient Documents under Patient Records.

3) 10/17/22 MG

Progress Note (Deming)

SOS

CLINICAL STATUS:

Ms. Ramirez's condition is stable today. No psychiatric complain

RECENT HISTORY:

Continued PTSD-related symptoms are reported by Ms. Ramirez.

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Sign Out
Edit
View
Format
Chat/Help

Continue

Photo

Chart Details

Ramirez Patient

Demographics

Go to E-Prescribe

Anaphylactic Reaction Reported
☐

Patient Information

Insurance Information

*Name (F,M,L,Suffix)

Daniella

Ramirez

☐ Homeless

☐ Bad Address

☐ Sample

☐ Chart

Address

3 Rio de Arenas #D1

Addr 2 / Appt #

City, State, Zip

Arenas Valley

County

Grant

City, State, Zip

Arenas Valley

State

NM

Zip

88022

Best Phone

☐ Home

☐ Work

☐ Cell

Home Phone

Cell Phone

(575)223-8062

Work Phone

Country

US

Other Names

Previous Address

*Date of Birth

7/29/1990

Unique Patient ID

1000010718315

*Gender

woman

Refer to patient as

Ms. Ramirez

SSN #

422-35-9318

Alt. Patient ID

Patient Status

☒ Active

☐ Inactive

☐ Pending

API

☐

Appt Reminders via:

☐ Email

☐ Text Message

☐ Phone Message

Employment Status

School or Employer

Grade

Marital Status

Sexual Orientation

*Ethnicity

Hispanic or Latino

Ethnicity 2

Religion

Annual Household Income

Family Size

Veteran

☐ Y

☐ N

*Race

White

Race 2

*Preferred Language

Disability

Native American

☐ Y

☐ N

Tribal Affiliation

Birth Order

Multiple Birth

☐

Release of Info

☐

Patient Calendar Note

Assigned Providers

are allowed to sign Notes for this Patient

Daniella Ramirez, CPSW

Role

X

Principal

< Select a Clinician >

< Multiple Clinicians >

Assign Provider(s)

Where Seen

Prime

SPIN Supporting

Add New Location

Med Rec

Red fields are required

Blue fields are optional but add info to clinical note.

* = Required for Meaningful Use

= Patient Has Accessed Portal

Show

Fields used by elec

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Find a Chart

Chart Room

Back To Report

Photo

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Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Dominguez, Ernesto

Supp.

ED Visit

This is the Chart Face for: Dominguez, Ernesto

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Schizoaffective disorder, depressive type, F25.1 (ICD-10) (Active)

Post-traumatic stress disorder, unspecified

Active Problem/Need List

Substance Abuse/dependence

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

History of Subst. Abuse

History of substance use

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 15

1) 7/14/23

Progress Note (Non-Rx) (Deming- Men's

Deming- M Transitional

Presenting Problem:

Today client came to me with issues of losing his home, and al know he may have and how to go about getting paternity tests.

CLINICAL STATUS:

2) 6/7/23

Treatment Plan (Deming- Men's

Deming- M Transitional

TREATMENT PLAN FOR ERNESTO DOMINGUEZ

A treatment plan was created or reviewed today, 6/7/2023, for E

Meeting Start: 12:00 PM - Meeting End: 1:00 PM

This was a Initial Treatment Team Meeting.

3) 5/26/23 MG

Progress Note (Deming)

Deming

Unfinished Note

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Sign Out

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Behavioral Health EHR

Chart Room

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Back

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Show Notes in List

Deming- Day Hab

709 S. Copper St

Deming, NM 88030

575-936-4177

575-936-4251

Use Note Creation Time

Clear Time

Set Date/Time

2/16/2023

2:33 PM

Medicaid ID: YIF905033914

Ramirez, Daniella

ID: 1000010718315 DOB: 7/29/1990

Progress Note (Deming)

Ms. Ramirez's behavior has been stable and uneventful and she denies any psychiatric problems or symptoms. She reports no side effects and none are in evidence. Problem Pertinent Review of Symptoms/Associated Signs and Symptoms: Psychotic, depressive, and anxiety symptoms are denied.

MENTAL STATUS EXAM: Mood is euthymic with no signs of depression or elevation. Her speech reveals no abnormalities of rate, volume, or articulation and her language skills are intact. She convincingly denies suicidal ideas. There are no signs of psychotic process. Her behavior is basically appropriate and there are no indications that hallucinations or delusions are present. There are no signs of a thought disorder. Associations are intact, thinking is generally logical, and thought content is appropriate. Cognitive functioning, based on vocabulary and fund of knowledge, is commensurate with her age and abilities. She is oriented to time and place and can remember recent and remote events. Patient is able to think abstractly. No signs of anxiety are present. There are no signs of hyperactive or attentional difficulties. Insight and judgment are generally intact.

CONTENT OF THERAPY:
The patient today spoke mainly about issues involving the workplace.

THERAPEUTIC INTERVENTION:
Instructions were given regarding providing peer support through common themes. This session the therapeutic focus was on emotional support.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Post-traumatic stress disorder, unspecified, F43.10 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

LEVEL OF CARE JUSTIFICATION:
Ms. Ramirez continues to need outpatient treatment, and requires continued treatment.

HEALTH CONCERNS AND RISKS:

90837 Psychotherapy 60 min.

Service Location

Turn

Audit Log

Copy contents of the text only into Copy complete note into

Print

Print Preview

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Chart Face
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Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061
575-956-6131
575-956-6947

Use Note Creation Time
Clear Time
Set Date/Time

10/17/2022
9:31 AM

Medicaid ID: YIF905033914

Ramirez, Daniella

ID: 1000010718315
DOB: 7/29/1990

Service Location

Turn

Audit Log

Copy contents of the text only into
Copy complete note into

Print

Print Preview

Progress Note (Deming)

CLINICAL STATUS:
Ms. Ramirez's condition is stable today. No psychiatric complaints have been expressed.

RECENT HISTORY:
Continued PTSD-related symptoms are reported by Ms. Ramirez. She today reports that those PTSD-related symptoms have improved, and are less frequent or intense.

BEHAVIOR:
Self-care skills are intact and unimpaired. Her domestic skills are intact. Her relationships with family and friends are normal. Ms. Ramirez is performing normally at work. She has maintained sobriety. Her anger is well controlled. Impulsive behaviors are not currently being displayed. Ms. Ramirez's food and water intake is normal. Ms. Ramirez is not confused. Ms. Ramirez describes sleep as "fair".

VERBAL CONTENT OF SESSION:
Ms. Ramirez discussed her issues with anxiety in today's session. Today I met with Ms. Ramirez in the office for a scheduled meeting. Daniella expresses having panic anxiety attacks, she is aware of it and encouraged to do more self care exercises. Daniella is also assisted in calling a program through the state Rent Help NM she is having a hard time getting through to update her email address so she can reapply for the program, this is also causing alot of anxiety for her at this time. Daniella expresses her kids are not wanting to go to the daycare agency that they go to after school, this is a concern of hers also. Daniella is gone over some breathing stress reducing techniques and emotional support.

THERAPEUTIC INTERVENTIONS:
In today's session, a goal for Ms. Ramirez was to build communication skills. In today's session, a goal for Ms. Ramirez was to build coping skills. In today's session, a goal for Ms. Ramirez was to improve her ability to manage stress. This session, Ms. Ramirez was given emotional support, structure, and unconditional positive regard. Ms. Ramirez was counseled regarding the need for compliance with all medical instructions, particularly having to do with medication. Therapeutic efforts today included a discussion of stress reduction techniques.

MENTAL STATUS EXAM: Ms. Ramirez presents as friendly, attentive, communicative, well groomed, and anxious. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. There were no signs of psychotic symptoms this session. Suicidal ideas are denied. Homicidal ideas or intentions are denied. Cognitive functioning and fund of knowledge are intact and age appropriate. Short- and long-term memory are intact, as is ability to abstract and do arithmetic calculations. This patient is fully oriented. Vocabulary and fund of knowledge indicate cognitive functioning in the normal range. Insight into problems appears normal. Judgment appears intact. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Ms. Ramirez's behavior in the session was cooperative and attentive with no gross behavioral abnormalities

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7/12/23, 5:02 AM

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Find a Chart

Chart Room

Photo

Ther. Groups

Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Venegas, Yajaira

Supp.

ED Visit

This is the Chart Face for: Venegas, Yajaira

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Generalized anxiety disorder, F41.1 (ICD-10) (Active)

Post-traumatic stress disorder, chronic, F43.12

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 6 of 6

1) 11/3/22 CAW Group Therapy Note (SOS) SOS

Session Remarks:

Group Type:

Focus Group: Focus groups are assigned specific topics o

2) 10/27/22 CAW Group Therapy Note (SOS) SOS

Session Remarks:

Group Type:

Focus Group: Focus groups are assigned specific topics o

3) 8/17/22 MG Progress Note (SPIN Supporting People SPIN Suppo

Assisted client with checking on the status of the rental assistan

application state application has been approved and that client ha

CONTENT OF THERAPY:

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

1 of 1

7/12/23, 5:04 AM

Sign Out
Edit
View
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Chat/Help

Continue

Photo

Chart Details

Venegas Patient

Demographics

Go to E-Prescribe

Anaphylactic Reaction Reported ☐

Patient Information

*Name (F,M,L,Suffix)

Yajaira

Venegas

☐ Homeless
☐ Bad Address
☐ Sample

Address

211 Cortez Street

Addr 2 / Appt #

City, State, Zip

Hurley

NM

88043

Best Phone

Home Phone

Country

US

☐ Home
☐ Work
☐ Cell

Cell Phone

(575)313-9036

Work Phone

ext

Patient Status

☒ Active
☐ Inactive
☐ Pending

Email

Email 2

Portal

☐

API

☐

Appt Reminders via:

☐ Email
☐ Text Message
☐ Phone Message

Employment Status

School or Employer

Grade

Marital Status

Sexual Orientation

*Ethnicity

Hispanic or Latino

Ethnicity 2

Religion

Annual Household Income

Family Size

Veteran

☐ Y
☐ N

*Race

Race 2

*Preferred Language

English

Disability

Native American

☐ Y
☐ N

Tribal Affiliation

Other Names

Previous Address

Insurance Information

*Date of Birth

7/3/1988

Unique Patient ID

1000010733316

*Gender

woman

Refer to patient as

Yajaira

SSN #

585-75-9407

Alt. Patient ID

Patient's Condition

Date Of Current Illness Onset

Date of Current Admission: From

Dates Unable To Work: From

Condition Related To Employment?

☐

Condition Related To Auto Accident?

☐

Condition Related To Other Accident?

☐

In treatment Previously?

☐ Y
☐ N

If yes, whe

Date Of Death

Preliminary Car

Release

☐ of Info

Patient

Calendar

Note

Miscella

Assigned Providers

Christina Wolford, LCSW

Role

X

Principal

are allowed to sign

Notes for this Patient

< Select a Clinician >

< Multiple Clinicians >

Assign Provider(s)

Where Seen

Prime

SPIN Supporting

Add New Location

Med Rec

Red fields are required

Blue fields are optional but add info to clinical note.

* = Required for Meaningful Use

✓ = Patient Has Accessed Portal

Show

Fields used by elec

1 of 1

7/12/23, 5:04 AM

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Back

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next >

Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Venegas, Yajaira

ID: 1000010733316 DOB: 7/3/1988
Group Therapy Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

11/3/2022

12:41 PM

Service Location

Turn

Audit Log

Copy contents of the text only into
Copy complete note into

Print

Print Preview

Session Remarks:

Group Type:
Focus Group: Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention.
Present Today:
Present at today's session were the following:
Only two members of the group were present today.
Group Leader Interventions:
Group Leader facilitated discussion about spirituality
Encouraged exploration
Extrapolated to Life
Assigned worksheet/activity with topic of spirituality
Plan:
Continue group.
Encourage increased attendance.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Generalized anxiety disorder, F41.1 (ICD-10) (Active)
Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)

HEALTH CONCERNS AND RISKS:

Time spent face to face with patient and/or family and coordination of care: 60 min

Session start: 9:30 AM
Session end: 10:30 AM

Christina Wolford, LCSW

Electronically Signed
By: Christina Wolford, LCSW
On: 11/4/2022 12:41:43 PM

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7/12/23, 5:05 AM

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Chart Room
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next >

Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Venegas, Yajaira

ID: 1000010733316 DOB: 7/3/1988
Group Therapy Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

10/27/2022

4:11 PM

Session Remarks:

Group Type:

Focus Group: Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention.

Present Today:

Present at today's session were the following:
Only two members of the group were present today.

Group Leader Interventions:

Group Leader facilitated discussion about spirituality
Encouraged exploration
Extrapolated to Life
Involved all Group
Kept Group Focused
Assigned worksheet/activity with topic of spirituality

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Generalized anxiety disorder, F41.1 (ICD-10) (Active)
Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)

HEALTH CONCERNS AND RISKS:

Time spent face to face with patient and/or family and coordination of care: 60 min

Session start: 9:30 AM
Session end: 10:30 AM

Christina Wolford, LCSW

Electronically Signed
By: Christina Wolford, LCSW
On: 10/27/2022 4:11:29 PM

Service Location

Turn

Audit Log

Copy contents of the text only into

Copy complete note into

Print

Print Preview

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Behavioral Health EHR

Find a Chart

Chart Room

Photo

Ther. Groups

Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Dingess, Ryan C

Supp.

ED Visit

This is the Chart Face for: Dingess, Ryan C

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

Active Problem/Need List

Current Medications

Print List

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

Chart Reminders

Add or Update Managed Care Authorizations

Enlarge

Filter Notes >>

Show All

Showing 14

1) 6/29/23

Case Management Note (SOS)

SOS

Presenting Problem:

Anxiety is still experienced by Ryan.

Ryan continues to experience mood swings.

2) 6/29/23

Case Management Note (SOS)

SOS

Presenting Problem:

Depressive symptoms continue.

Social Support Changes: Client

3) 6/1/23

Treatment Plan (SOS)

SOS

TREATMENT PLAN FOR RYAN C DINGESS

A treatment plan was created or reviewed today, 6/1/2023, for Rya

This was a 90 Day Treatment Plan.

Diagnosis:

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

1 of 1

7/12/23, 5:07 AM

Sign Out Edit View Format Chat/Help

ICANotes
Behavioral Health EHR

Continue

Photo

Chart Details

Dingess Patient

Demographics

Go to E-Prescribe

Anaphylactic Reaction Reported ☐

Patient Information		Insurance Information	
*Name (F,M,L,Suffix)	Ryan C Dingess	*Date of Birth	12/13/1984
<input type="checkbox"/> Homeless <input type="checkbox"/> Bad Address <input type="checkbox"/> Sample <input type="checkbox"/> Chart	Address 503 East 12th Street Addr 2 / Appt # City, State, Zip Silver City NM 88061	Unique Patient ID	1000010732493
Best Phone <input type="radio"/> Home <input type="radio"/> Work <input type="radio"/> Cell	Home Phone Cell Phone (575)654-8363 Work Phone Country US	*Gender	man
Patient Status <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending	Email Email 2 Portal <input type="checkbox"/>	Refer to patient as	Ryan
API <input type="checkbox"/>		SSN #	294-82-3970
Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message		Alt. Patient ID	
Employment Status		Other Names	
School or Employer		Previous Address	
Grade		Patient's Condition	
Marital Status		Date Of Current Illness Onset	
Sexual Orientation		Date of Current Admission: From	
*Ethnicity Caucasian	Birth Order	Dates Unable To Work: From	
Ethnicity 2	Multiple Birth	Condition Related To Employment? <input type="radio"/>	
Religion		Condition Related To Auto Accident? <input type="radio"/>	
Annual Household Income		Condition Related To Other Accident? <input type="radio"/>	
Family Size		In treatment Previously? <input type="radio"/> Y <input type="radio"/> N If yes, whe	
Veteran <input type="radio"/> Y <input type="radio"/> N	Release of Info	Date Of Death Preliminary Car	
*Race White	Patient Calendar Note		
Race 2			
*Preferred Language English			
Disability			
Native American <input type="radio"/> Y <input type="radio"/> N Tribal Affiliation			

Assigned Providers
are allowed to sign
Notes for this Patient

Veronica Diaz, CPSW Role X Principal

< Select a Clinician >
< Multiple Clinicians >
Assign Provider(s)

Where Seen

Prime SPIN Supporting

Add New Location

Med Rec

Red fields are required Blue fields are optional but add info to clinical note.
* = Required for Meaningful Use ✓ = Patient Has Accessed Portal

Show Fields used by elec

Sign Out
Edit
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Reports
Chat/Help




Chart Room
Chart Face
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Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061
575-956-6131
575-956-6947
Medicaid ID: YIF905334444

Dingess, Ryan C

ID: 1000010732493 DOB: 12/13/1984

Case Management Note (SOS)

Use Note Creation Time
Clear Time
Set Date/Time

6/29/2023
6:31 AM

Service Location
Turn

Audit Log

Copy contents of the text only into
Copy complete note into

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Presenting Problem:
Anxiety is still experienced by Ryan.
Ryan continues to experience mood swings.

Social Support Changes:
No changes in Ryan's family or social support network have occurred.

Recent History: Client is impaired in the functional domain(s) of:
learning
working
Independent living

Client has been with the shelter for approx 8 months

Client has been combative with other client in past

adjustment disorder
Unemployment (chronic)

THERAPEUTIC INTERVENTION: Client was actively listened to as he ventilated about his work. He was encouraged to speak openly with staff. Client had his feelings of frustration normalized. Client was assisted with entry into the laundry room. He was provided new clothing and he was given hygiene products for showering. Limit setting was provided for the client as he was told that he could not enter offices without staff being present.

Assessment: He appeared restless and fidgety, as evidenced by:

Ryan today appeared Ryan appears friendly, doleful, distracted,

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff. Continue making client aware of shelter rules and regulations and continue inquiring as to how the clients legal proceedings are developing.

Diagnosis: Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

History of Risk Factors:

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Show Notes in List

SOS

610 N. Silver St

Silver City, NM 88061

575-956-6131

575-956-6947

Medicaid ID: YIF905334444

Dingess, Ryan C

ID: 1000010732493 DOB: 12/13/1984

Use Note Creation Time

Clear Time

Set Date/Time

6/1/2023

10:50 PM

Treatment Plan (SOS)

TREATMENT PLAN FOR RYAN C DINGESS

A treatment plan was created or reviewed today, 6/1/2023, for Ryan Dingess.

This was a 90 Day Treatment Plan.

Diagnosis:

Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

PROBLEM / NEEDS:

Problem / Need # 1: Adjustment Disorder

Problem / Need: ADJUSTMENT DISORDER

PROBLEM: Adjustment Disorder

Ryan's adjustment disorder has been identified as an active problem that requires intervention. It is primarily evidenced by:

Anxiety/Nervousness: Details as follows:

*Excessive Worrying

*Impairment in Function

*Shifting Focus of Worry

*Hypervigilance

LONG TERM GOAL:

Ryan will stabilize anxiety level to the point where daily functioning is not impaired.

SHORT TERM GOAL(S) & INTERVENTIONS:

Short Term Goal / Objective:

Ryan will verbalize understanding of particular cognitive beliefs and messages that mediate the anxiety response, with the goal of decreasing episodes of anxiety to less than Frequency: 4 times per session Progress: Working on

Intervention:

Therapist/Counselor will provide therapy to encourage and support Ryan to develop reality based, positive cognitive messages with the goal of increasing self confidence and thereby decrease episodes of anxiety. Progress will be monitored and documented.

Intervention:

Therapist/Counselor will provide and explain anxiety scale, with the goal that Ryan will report decreased episodes of anxiety by 1 point on a self report 1-10 scale, reported monthly

Service Location

Turn

Audit Log

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7/12/23, 5:09 AM

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Find a Chart

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Ther. Groups

Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Dominguez, Dominic A

Supp.

ED Visit

This is the Chart Face for: Dominguez, Dominic A

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Major depressive disorder, single episode, severe with psychotic features, F32.3 (ICD-10) (Active)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 3

1) 1/19/23 MG

Progress Note (Deming)

Deming

Assisted client with checking on the status of the rental assistance ERAP. An Erap representative has stated client needs to submit a due statement from the landlord, current pay stubs, a lease agreement notified.

2) 1/9/23 MG

Progress Note (Deming)

Deming

Client has expressed that he is needing rental assistance and is asking him and his girlfriend because of non payment of rent. He is 4 months filling out an eviction prevention form on www.nmhomefund.org. The client is facing eviction, Erap will reach out to client.

3) 1/5/23 CAW

Complete Evaluation / Biopsychosocial

Deming

HISTORY: Dominic is a Hispanic or Latino 26-year-old man. His chief complaint is that he has been experiencing symptoms of a depressive disorder.

History:

Dominic describes symptoms of a depressive disorder.

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

1 of 1

7/12/23, 5:11 AM

Continue

Photo

Chart Details

Dominant Patient's

[Go to E-Prescribe](#)

Demographics

Anaphylactic Reaction Reported ☐

Patient Information		Insurance Information	
*Name (F,M,L,Suffix)	Dominic A Dominguez	*Date of Birth	5/21/1996
<input type="checkbox"/> Homeless	Address 1308 N Silver Street	Unique Patient ID	1000010739500
<input type="checkbox"/> Bad Address	Addr 2 / Appt #	*Gender	man
<input type="checkbox"/> Sample	County Grant	Refer to patient as	Dominic
<input type="checkbox"/> Chart	City, State, Zip Silver City NM 88061	SSN #	649-09-1639
Best Phone	Home Phone	Alt. Patient ID	
<input type="radio"/> Home	Cell Phone (575)322-7527	Other Names	
<input type="radio"/> Work	Work Phone	Previous Address	
<input type="radio"/> Cell	Email	Patient's Condition Date Of Current Illness Onset Date of Current Admission: From Dates Unable To Work: From Condition Related To Employment? Condition Related To Auto Accident? Condition Related To Other Accident? In treatment Previously? <input type="radio"/> Y <input type="radio"/> N If yes, when Date Of Death Preliminary Cause of Death	
Patient Status	Email 2		
<input checked="" type="radio"/> Active	Portal <input type="checkbox"/>		
<input type="radio"/> Inactive			
<input type="radio"/> Pending			
API <input type="checkbox"/>			
Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message			
Employment Status			
School or Employer			
Grade			
Marital Status			
Sexual Orientation			
*Ethnicity	Hispanic or Latino		
Ethnicity 2			
Religion			
Annual Household Income			
Family Size			
Veteran	<input type="radio"/> Y <input type="radio"/> N		
*Race	Unknown		
Race 2			
*Preferred Language	English		
Disability			
Native American	<input type="radio"/> Y <input type="radio"/> N Tribal Affiliation		
Assigned Providers are allowed to sign Notes for this Patient		Release of Info Patient Calendar Note Where Seen Med Rec	

Red fields are required **Blue fields are optional but add info to clinical note.**

* = Required for Meaningful Use ✓ = Patient Has Accessed Portal

Show

Fields used by elec

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Show Notes in List

Deming- Day Hab
709 S. Copper St
Deming, NM 88030

575-936-4177
575-936-4251

Dominguez, Dominic A

1/19/2023
2:15 PM

ID: 1000010739500 DOB: 5/21/1996

Progress Note (Deming)

Assisted client with checking on the status of the rental assistance application. A phone call was made to ERAP. An Erap representative has stated client needs to submit a non-participation statement and a past due statement from the landlord, current pay stubs, a lease agreement, and a photo ID. Client has been notified.

Problem Pertinent Review of Symptoms/Associated Signs and Symptoms: Feelings of anxiety are denied.

THERAPEUTIC INTERVENTION:
This session the therapeutic focus was on providing peer support through common themes. This session part of the therapeutic focus was on providing support and structure.

MENTAL STATUS EXAM:

Dominic's mood is euthymic with no signs of depression or manic process. He presents as relaxed, attentive, communicative, and well groomed and dressed. His speech is normal in rate, volume, and articulation and his language skills are intact. He denies suicidal or self injurious ideas or impulses. Assaultive or homicidal ideas or intentions are also denied. Hallucinations and delusions are denied and there is no apparent thought disorder. Associations are intact, thinking is generally logical, and thought content is appropriate. Cognitive functioning, based on vocabulary and fund of knowledge, is intact and age appropriate and he is fully oriented. There are no signs of anxiety apparent. He exhibits no signs of attentional or hyperactive difficulties. Insight and social judgment appear intact.

MEDICAL HISTORY:
History of migraines since age 16. Didnt like the side effects

No current meds
No known allergies

Medical history is negative and Dominic has no history of serious illness, injury, operation, or hospitalization. Does not have a history of asthma, seizure disorder, head injury, concussion or heart problems. No medications are currently taken.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Major depressive disorder, single episode, severe with psychotic features, F32.3 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

Service Location
Turn

Audit Log
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Show Notes in List

Deming- Day Hab

709 S. Copper St

Deming, NM 88030

575-936-4177

575-936-4251

Dominguez, Dominic

ID: 1000010739500 DOB: 5/21/1996

Use Note Creation Time

Clear Time

Set Date/Time

1/9/2023

3:15 PM

Progress Note (Deming)

Client has expressed that he is needing rental assistance and is worried that the landlord is going to evict him and his girlfriend because of non payment of rent. He is 4 months behind in rent. Assisted client with filling out an eviction prevention form on www.nmhomefund.org As soon as Erap receives the request that client is facing eviction, Erap will reach out to client.

CONTENT OF THERAPY:

This session the focus was on feelings of anxiety.

THERAPEUTIC INTERVENTION:

The main therapeutic techniques used this session involved methods of facilitating communication of feelings. Instructions were given in today's session regarding helping to clarify areas of difficulty and to develop coping skills and to manage stress. Instructions were given regarding providing peer support through common themes. Support and structure was given as part of today's session. The main therapeutic techniques used this session were supportive. Encouragement to ventilate feelings was also given to the patient.

MENTAL STATUS EXAM:

Dominic presents as friendly, attentive, communicative, casually groomed, but tense. but appears anxious. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation.

MEDICAL HISTORY:

History of migraines since age 16. Didnt like the side effects

No current meds

No known allergies

Medical history is negative and Dominic has no history of serious illness, injury, operation, or hospitalization. Does not have a history of asthma, seizure disorder, head injury, concussion or heart problems. No medications are currently taken.

DIAGNOSES:

The following Diagnoses are based on currently available information and may change as additional information becomes available.

Major depressive disorder, single episode, severe with psychotic features, F32.3 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

LEVEL OF CARE JUSTIFICATION:

Service Location

Turn

Audit Log

Copy contents of the text only into Copy complete note into

Print

Print Preview

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7/12/23, 5:13 AM



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Patient Account

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Manual Post Payments

Online Post Payments

Therapy Groups

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Michael White
(8/13/1975) #1000010739393
Account ID# 13603718

Chart Face

Demographics

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Additional Patient Information

Account Activity

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Patient Information

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Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$5,928.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$5,928.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$5,928.00	Not A

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/11/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/10/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/7/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/7/2023 H0038 Peer Support Daniella Ramirez, CP SW	60.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$60.00	\$0.00
7/5/2023 H0038 Peer Support Group Lawren Davenport, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/3/2023 H0038 Peer Support Joy Leatherman, CP SW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/2/2023 H0038 Peer Support Joy Leatherman, CP SW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/2/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/1/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00

Refresh All From Note

Add Late Fee

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Patient Account

Batch Statements

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Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Henry Lopez
(8/20/1962) #1000010738264
Account ID# 13602590

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Additional Patient Information

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Claims

Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment


	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$6,018.64	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$6,018.64	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$6,018.64	Not A

Account Detail

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/11/2023 H0038 Peer Support Group Lawren Davenport, CP SW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/11/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/10/2023 H0038 Peer Support Joy Leatherman, CP SW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/10/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/9/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/8/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	39.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$39.32	\$0.00
7/8/2023 H0038 Peer Support Joy Leatherman, CP SW	60.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$60.00	\$0.00
7/8/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/8/2023 H0038 Peer Support Group Lawren Davenport, CP SW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00

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Add Late Fee



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Prentis Johnson
(2/1/1982) #1000010738194
Account ID# 13602520

Chart Face

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Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$2,507.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$2,507.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$2,507.00	Not A

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/5/2023 H0038 Peer Support Joy Leatherman, CP SW	45.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$45.00	\$0.00
7/4/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/4/2023 H0038 Peer Support Group Lawren Davenport, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
6/28/2023 H0038 Peer Support Group Lawren Davenport, CP SW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
6/28/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
6/27/2023 H0038 Peer Support Group Lawren Davenport, CP SW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
6/27/2023 H0038 Peer Support Joy Leatherman, CP SW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
6/27/2023 H0038 Peer Support Joy Leatherman, CP SW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
6/26/2023 H2016 Comprehensive Community Joy Leatherman, CP SW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00

Refresh All From Note

Add Late Fee

Make Appoi

Claims

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$3,939.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$3,939.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$3,939.00	Not A

Add Late Fee

7/12/23, 5:23 AM

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Manual Post Payments

Online Post Payments

Therapy Groups

C

Q Find

Nicole S Vannatter

(5/23/1995) #1000010718235

Account ID# 13582563

Additional Patient Information

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Account Summary

Viewing Options

☒ All Charges
 ☐ Charges with Balances

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$3,262.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$3,262.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$3,262.00	Not A

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
3/24/2023 H0038 Peer Support Tomas Sandoval, CP SW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
3/24/2023 H0038 Peer Support Tomas Sandoval, CP SW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
3/24/2023 80837 Psychotherapy 60 min. Christina Wolford, LCSW	125.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$125.00	\$0.00
3/22/2023 00176 Activity Session (Group) Christina Wolford, LCSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
3/22/2023 H0038 Peer Support Joy Leatherman, CP SW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
3/22/2023 80837 Psychotherapy 60 min. Jeffrey "Yaakov" Finer,	125.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$125.00	\$0.00
3/21/2023 H0038 Peer Support Group Christina Wolford, LCSW	10.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$10.00	\$0.00
3/20/2023 H0038 Peer Support Joy Leatherman, CP SW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
3/20/2023 H0038 Peer Support Daniela Ramirez, CP SW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00

Refresh All From Note

Add Late Fee

1 of 1

7/12/23, 5:24 AM

Sign Out Edit View Format Reports Chat/Help

Chart Room

Last Chart

Calendar

Patients assigned to you are highlighted

Patient Records

Total Patient Count: 1458

Only Applies to New Patient Report

From: 7/11/2023 To: 7/12/2023 Site name: Include: ☒ All Patients. ☐ Patients WITH treatment plans only. ☐ Patients WITHOUT treatment plans only.

Show All Patients

Show New Patients Added >>

Export

Print

Patient Name

Unique ID

Last Exam

Clinician

Status

\$ Proudlock, Johnathon	1000010719288	7/26/2023	Michelle Grayless, MSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Dominguez, Ernesto	1000010717476	7/14/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Hernandez, Jimmy	1000010729605	7/13/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Romero, Andrew	94	7/13/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Bridges, Josh	103	7/13/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Foster, Dana	105	7/13/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Mudry, Crystal	1000010690657	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Lazzell, Shanti	1000010700116	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Gallegos, Vincent	1000010717470	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Cummins, Sheldon	1000010717897	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Porras, Jose	1000010718034	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Tatom, Cody R	1000010722270	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Rodriguez, Melissa	1000010723120	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Cyrus, Sarah	1000010727962	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ McAllister, Mark	1000010734998	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Johnson, Pamela	1000010735999	7/11/2023	Christina Wolford, LCSW	<input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/>
\$ Peters, Eric	1000010736057	7/11/2023	Jeffrey Finer, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Muniz, Jeramiah S	1000010736210	7/11/2023	Kathy Quarrell, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Lopez, Henry	1000010738264	7/11/2023	Kathy Quarrell, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ White, Michael	1000010739393	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Sprague, David S	44	7/11/2023	Tomas Sandoval, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Sanders, Crystal	46	7/11/2023	Joy Leatherman, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Kilbourne, Liane	84	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Griego, Christopher	100	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Radan, Robert	108	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Madrid, Bernie	119	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Prevost, Michael	120	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Pflanz, Kristina	121	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ McKee Young, Danny Rey	1000010699747	7/10/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Rivera, Matias	1000010728761	7/10/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Armendariz Barela, Eva	1000010729151	7/10/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Yniguez, Thomas J	1000010731328	7/10/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Murillo, Ruben	1000010733101	7/10/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Ludwig, Edward	1000010733466	7/10/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>
\$ Haves, Christopher	1000010733677	7/10/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/>

1 of 1

7/12/23, 5:27 AM

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Photo

Chart Details

Proud Patient

Demographics

Go to E-Prescribe

Anaphylactic Reaction Reported
☐

Patient Information

Insurance Information

*Name (F,M,L,Suffix)
Johnathon
Proudlock
J

*Date of Birth
5/12/1996

☒ Homeless

Address
610 N Silver

Unique Patient ID
1000010719288

☐ Bad Address

Addr 2 / Appt #
po box 325

County
grant

☐ Sample Chart

City, State, Zip
Silver City
NM
88062

*Gender
man

Best Phone

Home Phone

Country
US

☐ Home

Cell Phone

☐ Work

Work Phone

ext

☐ Cell

Email

Patient Status

☒ Active
☐ Inactive
☐ Pending

Email 2

Portal
☐

API
☐

Appt Reminders via:
☐ Email
☐ Text Message
☐ Phone Message

Employment Status

School or Employer

Grade

Marital Status
single

Sexual Orientation
Don't know

*Ethnicity
Hispanic or Latino

Ethnicity 2

Religion

Annual Household Income

Family Size

Veteran
☐ Y ☐ N

*Race
White

Race 2

*Preferred Language
English

Disability

Native American
☐ Y ☐ N
Tribal Affiliation

Other Names

Previous Address

Patient's Condition

Date Of Current Illness Onset

Date of Current Admission: From

Dates Unable To Work: From

Condition Related To Employment?
☐

Condition Related To Auto Accident?
☐

Condition Related To Other Accident?
☐

In treatment Previously?
☐ Y ☐ N

If yes, whe

Date Of Death

Preliminary Car

Assigned Providers

Kathy Quarrell, CPSW
Role
X
Principal

< Select a Clinician >

< Multiple Clinicians >

Assign Provider(s)

Where Seen

Prime
SOS

Add New Location

Med Rec

Red fields are required
Blue fields are optional but add info to clinical note.

* = Required for Meaningful Use
☒ = Patient Has Accessed Portal

Show

Fields used by elec

1 of 1

7/12/23, 5:29 AM

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Show Notes in List

Men's Transitional Home- Deming
416 S. Silver St
Deming, NM 88030

575-936-4177
575-936-4251

Proudlock, Johnathon

ID: 1000010719288 DOB: 5/12/1996

Use Note Creation Time

Clear Time

Set Date/Time

7/26/2023

12:19 AM

Progress Note (Non-Rx) (Deming- Men's Transitional Home)

Client has experienced or is experiencing the following: Client says he is hungry and tired and hot!

Client has not showered in a week and doesn't want to shower, he has a very strong odor and he needs to change clothes, I worry about his health with this kind of hygiene issues.

Client refuses to go to his house says he doesn't feel safe there and there are people he doesn't know there that tell him he has to leave, I will be taking him to his house and find out if any one is there and have them leave if there is. If I can get him to shower my supervisor Christina LCSW is going to have him go back to the shelter in Silver City with her if he would like to go.

BEHAVIOR:
He has stopped taking prescribed medication. He needs assistance or cues for self care tasks. His ability to do domestic tasks is impaired and he is dependent on others. His relationships with family and friends have ceased. His use of substances has increased to an amount that is greater than advised. Some angry outbursts are occurring. Impulsive behaviors are occurring, but less frequently. Mr. Proudlock has diminished food and fluid intake. Mr. Proudlock is sometimes confused.
Provided coaching by discussing emotional reactions to an event, discussing barriers and strengths.

Client did shower and changed clothes and also went to the shelter in Silver City looking to find help there with housing issues, isolation issues, and quit using illicit drugs.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Other schizoaffective disorders, F25.8 (ICD-10) (Active)
Discord with neighbors, lodgers and landlord, Z59.2 (ICD-10) (Active)
Contact with and (suspected) exposure to other communicable diseases, Z20.89 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

LEVEL OF CARE JUSTIFICATION:
Mr. Proudlock continues to need outpatient treatment. He continues to exhibit symptoms of an emotional disorder that interfere with day to day functioning and requires continued treatment.

BARRIERS

- Increase social support system
- Assist in finding community support

Service Location
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Make Appoi

Claims

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$1,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$1,500.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$1,500.00	Not A

Add Late Fee

Sign Out

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Find a Chart

Chart Room

Ther. Groups

Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Talferro, Miya

Supp.

ED Visit

This is the Chart Face for: Talferro, Miya

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Major depressive disorder, recurrent, mild, F33.0 (ICD-10) (Active)

Child in welfare custody, 762.21 (ICD-10)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS: History of Substance abuse

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 17

1) 6/27/23

Group Therapy Note (SOS)

SOS

Time spent face to face with patient and/or family and coordinati

Session start: 10:00 AM

Session end: 2:00 PM

2) 6/25/23

Progress Note (Non-Rx) (SPIN)

SPIN Suppo

People In N

BEHAVIOR:

Her self care skills are intact. Her domestic skills are intact. Her

normal. She is performing normally at work. She has maintained

There have been no reported instances of impulsive behaviors. M

has not been confused.

3) 6/25/23

Group Therapy Note (SOS)

SOS

Time spent face to face with patient and/or family and coordinati

Session start: 10:00 AM

Session end: 2:00 PM

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

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Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Taliferro, Miya

ID: 1000010739075 DOB: 7/10/1992

Use Note Creation Time

Clear Time

Set Date/Time

6/27/2023

2:10 PM

Group Therapy Note (SOS)

Time spent face to face with patient and/or family and coordination of care: 240 min
Session start: 10:00 AM
Session end: 2:00 PM

Session Remarks:
Therapy Type:
Recreational Therapy
Group was facilitated by Jeffrey Finer, CPSW, Lawren Davenport, CPSW, and Christina Wolford, LCSW

Group Type:
Activity Therapy: Activity Therapy includes a variety of activities designed to help the group members learn more about themselves, problem solve, express feelings in appropriate ways, reduce stress and improve relationships with others. Today's activity involved nature. Participants engaged in a scavenger hunt while on an outing in the forest. The group engaged in soaking at the hot springs and discussing the experience of camping as related to improving function in socialization and recreation as a way to reduce anxiety and depressive symptoms. Peers coached participants through learning rules, safety, group meal prep and eating, and planning.
Present Today:
Present at today's session were the following:
Ten members of the group were present today.
Group Leader Interventions:
Group Leader facilitated discussion about building self esteem.
Involved all Group
Extrapolated to Life
Plan:
Continue group in order to develop coping skills needed for life.

Individual Remarks:

Participation:
Miya was active today and participated fully in discussions today. She participated in the activities with her eldest son. Miya was able to practice socialization and recreation. She has never been camping before and was able to teach her son valuable social skills.

Behavior:
She presented as perceptive and insightful. Miya readily shared her experiences and feelings in group today.

Stage of Change:

Service Location
Turn

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Show Notes in List

Men's Transitional House Silver City
1307 N. Swan St
Silver City, NM 88061

575-956-6242
575-956-6947

Use Note Creation Time

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Set Date/Time

Taliferro, Miya

6/25/2023 9:21 PM

ID: 1000010739075 DOB: 7/10/1992

Progress Note (Non-Rx) (SPIN Supporting People In Need)

BEHAVIOR:

Her self care skills are intact. Her domestic skills are intact. Her relationships with family and friends are normal. She is performing normally at work. She has maintained sobriety. Anger has been well controlled. There have been no reported instances of impulsive behaviors. Miya has normal food and fluid intake. Miya has not been confused.

CONTENT OF THERAPY:

Recreational therapy was utilized with client to reduce stress levels and decrease depressive episodes. Goals to improve/maintain physical, cognitive, social, emotional, and spiritual functioning were discussed. Client states she is more confident in herself after session. PSS provided coaching by discussing emotional reactions to an event, discussing barriers and strengths.

THERAPEUTIC INTERVENTION:

Used Motivational Interviewing to explore the situation. Used active listening and reframing to build rapport. This session part of the therapeutic focus was on improving limit setting and boundaries. The main therapeutic techniques used this session were supportive.

MENTAL STATUS EXAM:

Miya appears friendly, wary, attentive, communicative, casually groomed, normal weight, but appears anxious. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. Homicidal ideas or intentions are denied. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Miya's behavior in the session was cooperative and attentive with no gross behavioral abnormalities. The patient convincingly denies suicidal ideas or intentions.

LEVEL OF CARE JUSTIFICATION:

Miya continues to need outpatient treatment. She continues to exhibit symptoms of an emotional disorder that interfere with day to day functioning and requires continued treatment.

DIAGNOSES:

The following Diagnoses are based on currently available information and may change as additional information becomes available.

Major depressive disorder, recurrent, mild, F33.0 (ICD-10) (Active)
Child in welfare custody, Z62.21 (ICD-10) (Active)
Housing instability, housed, with risk of homelessness, Z59.811 (ICD-10) (Active)
Problems related to other legal circumstances, Z65.3 (ICD-10) (Active)

H0038 Peer Support - TV

Time spent on this activity: 240 min Session start: 8:00 AM Session end: 12:00 PM

Service Location

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7/12/23, 5:49 AM

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SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Taliferro, Miya

ID: 1000010739075 DOB: 7/10/1992

Use Note Creation Time

Clear Time

Set Date/Time

6/25/2023

3:38 PM

Group Therapy Note (SOS)

Time spent face to face with patient and/or family and coordination of care: 240 min
Session start: 10:00 AM
Session end: 2:00 PM

Session Remarks: Therapy Type:
Recreation

The purpose of today's group was to provide skills training around the topic of 'recreation and socialization', for the purpose of developing skills related to improving independent community living, maintaining a stable living environment, improving interpersonal effectiveness, decreasing anxiety symptoms, decreasing anger outbursts, and decreasing depressive symptoms.

Present Today:
Present at today's session were the following:
Ten members of the group were present today.

Group was facilitated by Jeffrey Finer, CPSW, Lawren Davenport, CPSW, and Christina Welford, LCSW

Group Leader Interventions:
Group Leader engaged group in mood check/safety check. Group leader engaged group in review of yesterday's experiences and topics.
Group leader provided a review of skills learned over the weekend and bridged session into new topic area.
Group leader used DBT around the topic of 'mindfulness,' for the purpose of increasing interpersonal effectiveness. The group participated in exploration of the Gila River, and planning and organizing meal preparation and socialization.

Individual Remarks:
Appearance and Behavior:
In today's session Miya appeared friendly, communicative, and happy.

Participation: She was over talkative or hyperv verbal in today's session. Miya fully participated in the exploration of the river today. She was able to discuss feelings about many firsts for her on this adventure. She was able to discuss ways that this experience will assist her in life and in her recovery goals.

Stage of Change:
Action

Service Location
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Show Notes in List

Men's Transitional House Silver City
1307 N. Swan St
Silver City, NM 88061

575-956-6242
575-956-6947

Taliferro, Miya

ID: 1000010739075 DOB: 7/10/1992

Use Note Creation Time

Clear Time

Set Date/Time

6/24/2023

9:18 PM

Progress Note (Non-Rx) (SPIN Supporting People In Need)

BEHAVIOR:
Her self care skills are intact and unimpaired. Her domestic skills are intact and unimpaired. Her relationships with family and friends are normal. Her work performance is normal. She has maintained sobriety. No anger has been displayed. There have been no reported instances of impulsive behaviors. Miya has not been confused.

CONTENT OF THERAPY:
Outdoor recreational therapy to reduce stress and depression levels. Client was coached through social interaction and nature walks. Client was coached staying focused and relaxed during an intense hike. Client provided coaching through cultural differences and self imposed restraints.

THERAPEUTIC INTERVENTION:
One of the therapeutic techniques used this session involved providing peer support through common themes. This session part of the therapeutic focus was on improving limit setting and boundaries. The main therapeutic technique used this session involved building self-esteem. The patient was given emotional support.

MENTAL STATUS EXAM: Miya appears friendly, wary, attentive, guarded, casually groomed, normal weight, but appears anxious. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. Homicidal ideas or intentions are denied. No suicidal ideas or intentions are present today. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Miya's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

LEVEL OF CARE JUSTIFICATION:
Miya continues to need outpatient treatment. She continues to exhibit symptoms of an emotional disorder that interfere with day to day functioning and requires continued treatment.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Major depressive disorder, recurrent, mild, F33.0 (ICD-10) (Active)
Child in welfare custody, Z62.21 (ICD-10) (Active)
Housing instability, housed, with risk of homelessness, Z59.811 (ICD-10) (Active)
Problems related to other legal circumstances, Z65.3 (ICD-10) (Active)

H0038 Peer Support - TV
Time spent on this activity: 240 min Session start: 8:30 AM Session end: 12:30 PM

Service Location
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Show Notes in List

Men's Transitional House Silver City

1307 N. Swan St

Silver City, NM 88061

575-956-6242

575-956-6947

Taliferro, Miya

ID: 1000010739075 DOB: 7/10/1992

Use Note Creation Time

Clear Time

Set Date/Time

6/24/2023

1:07 PM

Group Therapy Note (SPIN Supporting People In Need)

Time spent face to face with patient and/or family and coordination of care: 60 min

Session start: 5:12 PM

Session end: 6:12 PM

Session Remarks:

Group Type:

Focus Group: Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention.

Present Today:

Present at today's session were the following:

Only two members of the group were present today.

Group Leader Interventions:

Group Leader facilitated discussion about spirituality and building self esteem.

Plan:

Continue group.

Continue Skill Development

Individual Remarks:

Participation:

Ms. Taliferro worked at being attentive, while taking care of her youngest child, taking a call from her PO, and doing other little chores after she arrived from work. We agreed to start the meeting a half hour later on a trial basis.

Mental Status Exam:

Miya's mood is difficult to assess today.

There are no signs of hallucinations, delusions, thought disorder or other signs of psychotic process.

Speech is normal in rate, volume and articulation and is coherent and spontaneous.

Stage of Change:

Action

Link to Treatment Plan Problem: Anxiety

PROBLEM: Anxiety

Miya's anxiety has been identified as an active problem that requires treatment. It is

Service Location

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7/12/23, 5:51 AM

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1307 N. Swan St
Silver City, NM 88061

575-956-6242
575-956-6947

Taliferro, Miya

ID: 1000010739075 DOB: 7/10/1992

Use Note Creation Time

Clear Time

Set Date/Time

6/22/2023
11:52 AM

Group Therapy Note (SPIN Supporting People In Need)

Time spent face to face with patient and/or family and coordination of care: 60 min
Session start: 8:30 AM
Session end: 9:30 AM

Session Remarks:
Therapy Type:
Cognitive Behavioral Therapy with an emphasis on building new habits.

Group Type:
Focus Group: Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention. The focus of today's group was how to build new habits. The purpose was to familiarize the group members with the concept of support groups by having them look at who they turn to in times of stress. Discussion of strategies to develop such relationships was encouraged.

Present Today:
Present at today's session were the following:
Only two members of the group were present today. Group facilitated by Lawren Davenport, cpsw/ccss.

Group Leader Interventions:
Therapist allowed client to direct art or activity toward goal of building healthy coping alternatives. Motivational interviewing utilized

Plan:
Encourage increased participation.
Encourage increased attendance.
Continue group.

Individual Remarks:
Appearance and Behavior:
In today's session Miya appeared friendly, communicative, and anxious.

Participation:
Miya was active today and participated fully in discussions today. Client was positively impacted by the group today because they felt safe to share and received positive feedback. The group was positively impacted by the client because of their encouraging statements and felt accepted.

Verbal Content:
Miya spoke of interpersonal problems today, during the session. PSS provided coaching by discussing emotional reactions to an event discussing barriers and strengths

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Men's Transitional House Silver City

1307 N. Swan St

Silver City, NM 88061

575-956-6242

575-956-6947

Taliferro, Miya

ID: 1000010739075 DOB: 7/10/1992

Use Note Creation Time

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Set Date/Time

6/19/2023

4:45 PM

Group Therapy Note (SPIN Supporting People In Need)

Time spent face to face with patient and/or family and coordination of care: 60 min

Session start: 5:03 PM

Session end: 6:03 PM

Session Remarks:

Group Type:

Focus Group:

Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention.

Present Today:

Present at today's session were the following: There was only one present today.

Group Leader Interventions:

Group Leader facilitated discussion about spirituality.

Extrapolated to Life

Plan:

Continue group.

Encourage increased attendance.

Video was used to address critical thinking skills.

Individual Remarks:

absent - at work

DIAGNOSES:

The following Diagnoses are based on currently available information and may change as additional information becomes available.

Major depressive disorder, recurrent, mild, F33.0 (ICD-10) (Active)

Child in welfare custody, Z62.21 (ICD-10) (Active)

Housing instability, housed, with risk of homelessness, Z59.811 (ICD-10) (Active)

Problems related to other legal circumstances, Z65.3 (ICD-10) (Active)

HEALTH CONCERNS AND RISKS:

History of Substance abuse

1 Unit for H0038 Peer Support Group

Service Location

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7/12/23, 5:52 AM

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Patient Account

Batch Statements

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Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Q Find

Charles Fiorentino
(6/10/1971) #1000010713573
Account ID# 13577901

Chart Face

Demographics

Make Appoi

Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$2,297.69	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$2,297.69	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$2,297.69	Not A

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
6/27/2023 H0038 Peer Support Group Christina Wolford, LCSW	160.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$160.00	\$0.00
6/25/2023 H0038 Peer Support Group Christina Wolford, LCSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
6/25/2023 H0038 Peer Support Daniella Ramirez, CPSW	90.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$90.00	\$0.00
6/22/2023 H0038 Peer Support Kathy Quarrell, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
6/5/2023 90837 Psychotherapy 60 min. Joy Leatherman, CPSW	125.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$125.00	\$0.00
6/5/2023 H0038 Peer Support Amber Patterson, CPSW	60.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$60.00	\$0.00
6/4/2023 H2011 C&W Crisis Intervention faac Kathy Quarrell, CPSW	32.69	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$32.69	\$0.00
5/31/2023 H2016 Comprehensive Community Christina Wolford, LCSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
5/22/2023 90837 Psychotherapy 60 min. Joy Leatherman, CPSW	125.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$125.00	\$0.00

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810 N. Silver St
Silver City, NM 88061
575-956-6131
575-956-6947
Medicaid ID: YIF905363185

Use Note Creation Time
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6/25/2023
3:43 PM

Fiorentino, Charles

ID: 1000010713573 DOB: 6/10/1971
Case Management Note (SOS)

Service Location
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Presenting Problem:

ADHD symptoms continue to be described by Charles. Charles continues to be hyperactive. Charles continues to be impulsive.

Recent History:

Charles has attended the transition house camping trip this weekend. Charles is experiencing relief from anxiety but is still having impulsive behaviors. Charles is impaired in the functional domains of independent and community living, socializing, and recreation.

Social Support Changes:

No changes in Charles's family or social support network have occurred.

Case Management Services as follows were provided today:

Case Manager today met with as he expressed his frustrations of living alone, and wanting to move to Silver City. Used motivational interviewing to assess the situation and set goals. Used active listening to build rapport.

Plan:

Follow up with client to ensure goals are met, and insure appropriate action.

Interventions:

Peer support will encourage and support Charles to identify to supportive resources that can help him achieve his goals. and assistance as needed so that the feeling of being unable to achieve and cope will occur less.

Progress will be monitored and documented.

Schizoaffective disorder, unspecified, F25.9 (ICD-10) (Active)

Attention-deficit hyperactivity disorder, unspecified type, F90.9 (ICD-10) (Active)

6 Units for H0038 Peer Support

Time spent face to face with patient and/or family and coordination of care: 90 min

Session start: 10:00 AM

Session end: 11:30 AM

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575-956-6947

Medicaid ID: YIF905363185

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6/25/2023

3:38 PM

Fiorentino, Charles

ID: 1000010713573 DOB: 6/10/1971

Group Therapy Note (SOS)

Time spent face to face with patient and/or family and coordination of care: 240 min
Session start: 10:00 AM
Session end: 2:00 PM

Session Remarks: Therapy Type:

Recreation

The purpose of today's group was to provide skills training around the topic of 'recreation and socialization', for the purpose of developing skills related to improving independent community living, maintaining a stable living environment, improving interpersonal effectiveness, decreasing anxiety symptoms, decreasing anger outbursts, and decreasing depressive symptoms.

Present Today:
Present at today's session were the following:
Ten members of the group were present today.

Group was facilitated by Jeffrey Finer, CPSW, Lawren Davenport, CPSW, and Christina Wolford, LCSW

Group Leader Interventions:
Group Leader engaged group in mood check/safety check. Group leader engaged group in review of yesterday's experiences and topics.
Group leader provided a review of skills learned over the weekend and bridged session into new topic area.
Group leader used DBT around the topic of 'mindfulness,' for the purpose of increasing interpersonal effectiveness. The group participated in exploration of the Gila River, and planning and organizing meal preparation and socialization.

Individual Remarks:

Appearance and Behavior:

In today's session Charles appeared communicative, slightly disorganized in thoughts, and happy.

Participation:

He was over talkative or hypervocal in today's session.
Charles was active today and participated fully in discussions today. He displayed good comprehension in the group. Charles was able to share evidence of progress toward personal recovery goals. He was able to express insight into his experiences.

Charles appeared to have a positive response to the group. At the end of the session, he

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810 N. Silver St
Silver City, NM 88061
575-956-6131
575-956-6947
Medicaid ID: YIF905363185

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6/24/2023

Fiorentino, Charles
ID: 1000010713573 DOB: 6/10/1971

Group Therapy Note (SOS)

Time spent face to face with patient and/or family and coordination of care: 240 min
Session start: 10:00 AM
Session end: 2:00 PM

Session Remarks:
Therapy Type:
Recreational Therapy
Group was facilitated by Jeffrey Finer, CPSW, Lawren Davenport, CPSW, and Christina Wolford, LCSW

Group Type:
Activity Therapy: Activity Therapy includes a variety of activities designed to help the group members learn more about themselves, problem solve, express feelings in appropriate ways, reduce stress and improve relationships with others. Today's activity involved nature. Participants engaged in a scavenger hunt while on an outing in the forest. The group engaged in soaking at the hot springs and discussing the experience of camping as related to improving function in socialization and recreation as a way to reduce anxiety and depressive symptoms. Peers coached participants through learning rules, safety, group meal prep and eating, and planning.

Present Today:
Present at today's session were the following:
Ten members of the group were present today.

Group Leader Interventions:
Group Leader facilitated discussion about building self esteem.
Involved all Group
Extrapolated to Life

Plan:
Continue group in order to develop coping skills needed for life.

Individual Remarks:

Participation:
Charles was active today and participated fully in discussions today.

Behavior:
He presented as perceptive and insightful. Charles shared his feelings about today's activity with the group. He encouraged others while listening with purpose. Charles shared some of the skills he is learning in IOP.

Stage of Change:
Action

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Deming- Day Hab
709 S. Copper St
Deming, NM 88030

575-936-4177
575-936-4251

Medicaid ID: YIF905363185

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6/22/2023
1:26 PM

Fiorentino, Charles

ID: 1000010713573 DOB: 6/10/1971

Progress Note (Deming)

Charles has a history of substance abuse, depression, anxiety, and loneliness.

Provided coaching by discussing emotional reactions to an event, discussing barriers and strengths. Charles learned of a camp out that has been planned for the coming weekend. Charles has shown great interest in going with them. We will check if they have room in the transportation that he could go along. Charles does enjoy being with a group and feels comfortable with the men from the transitional home.

Activities are related to identifying interests, setting goals for participation in groups or group activities, or developing skills in structure or utilizing leisure time. Charles is very will to do things with and in a group, he does participate in well.

Charles does do okay living independent , but does seem to get lonely.

Charles will continue to go to his class and group in Las Cruces and seems really to enjoy that. He looks forward to it every week.

MEDICAL HISTORY:
Mr. Fiorentino sees a doctor at Ben Archer
Mr. Fiorentino sees an eye doctor at Fillmore.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Schizoaffective disorder, unspecified, F25.9 (ICD-10) (Active)
Attention-deficit hyperactivity disorder, unspecified type, F90.9 (ICD-10) (Active)
Food insecurity, Z59.41 (ICD-10) (Active)
Food insecurity, Z59.41 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

LEVEL OF CARE JUSTIFICATION:
Charles continues to need outpatient treatment. He continues to exhibit symptoms of an emotional disorder. Charles talks freely about what is on his mind and really looks forward to the support he is getting from all his resources.

HEALTH CONCERNS AND RISKS:
History of suicidal ideation

Service Location

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7/12/23, 5:58 AM

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SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Proudlock, Johnathon

ID: 1000010719288 DOB: 5/12/1996
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/28/2023

5:30 PM

Presenting Problem:
Anxiety is still experienced by Mr. Proudlock.
Mr. Proudlock continues to experience depression.
Mr. Proudlock continues to exhibit symptoms of a conduct disorder. Destructive behavior is evident.
Symptoms of mood swings continue to be described.

Recent History: Client has a history of chronic homelessness, unemployment, anxiety, depression, hallucinations, psychosis, substance use, poverty.

Social Support Changes:
No changes in Mr. Proudlock's family or social support network have occurred.

Intervention:
Provided and assisted client with getting him something to eat for nutritional benefits.
Prompted client to drink some water.

Assessment:

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Anger Management Problems
*History of Mental Illness:
Carries a Diagnosis of Borderline Personality
Carries a Diagnosis of Schizophrenia

Current Risk Factors:
*Agitated or Very Angry:
History of Violent Behaviors
*Experiencing Severe Anxiety or Panic
*Describes Command Hallucinations, details are as follows:
*A Major Depression is Present
*Homicidal ideas are Expressed:
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present:
Affect Flat or Blunted
*Impaired Impulse Control
*Severe Insomnia is Present
*Serious Current Medical Problems

Suicide Risk:

Service Location
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SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Use Note Creation Time
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7/28/2023
8:42 PM

Proudlock, Johnathon

ID: 1000010719288 DOB: 5/12/1996

Case Management Note (SOS)

Presenting Problem:
Mr. Proudlock continues to experience anxiety as well as symptoms of a schizoaffective disorder.

Recent History:
Client has a history of chronic homelessness, unemployment, substance abuse, a schizoaffective disorder, and impairment in the functional domains of independent living, working, recreation, and socializing.

Social Support Changes:
Mr. Proudlock's family or social support network has occurred no changes.

Intervention:
Prompted client to fulfill contractual obligations so that he may continue to stay overnight at the shelter.

Assessment:
Mr. Proudlock appears flat, uncommunicative, and slow to respond. His speech cannot be tested. Mood cannot be assessed. Mr. Proudlock is restless. Mr. Proudlock made poor eye contact during the examination.

Plan:
Continue to prompt client to fulfill contractual obligations as needed.

Diagnosis: Other schizoaffective disorders, F25.8 (ICD-10) (Active)
Discord with neighbors, lodgers and landlord, Z59.2 (ICD-10) (Active)
Contact with and (suspected) exposure to other communicable diseases, Z20.89 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Schizophrenia
Multiple Psychiatric Hospitalizations

Current Risk Factors:
*Absent or Weak Support System:
*Carries a Diagnosis of Schizophrenia

Suicide Risk Assessment:
Mr. Proudlock denies suicidal ideas or intentions.

Service Location
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810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Proudlock, Johnathon

ID: 1000010719288 DOB: 5/12/1996

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7/28/2023
5:30 PM

Case Management Note (SOS)

Presenting Problem:
Anxiety is still experienced by Mr. Proudlock.
Mr. Proudlock continues to experience depression.
Mr. Proudlock continues to exhibit symptoms of a conduct disorder. Destructive behavior is evident.
Symptoms of mood swings continue to be described.

Recent History: Client has a history of chronic homelessness, unemployment, anxiety, depression, hallucinations, psychosis, substance use, poverty.

Social Support Changes:
No changes in Mr. Proudlock's family or social support network have occurred.

Intervention:
Provided and assisted client with getting him something to eat for nutritional benefits.
Prompted client to drink some water.

Assessment:

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Anger Management Problems
*History of Mental Illness:
Carries a Diagnosis of Borderline Personality
Carries a Diagnosis of Schizophrenia

Current Risk Factors:
*Agitated or Very Angry:
History of Violent Behaviors
*Experiencing Severe Anxiety or Panic
*Describes Command Hallucinations, details are as follows:
*A Major Depression is Present
*Homicidal ideas are Expressed:
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present:
Affect Flat or Blunted
*Impaired Impulse Control
*Severe Insomnia is Present
*Serious Current Medical Problems

Suicide Risk:

Service Location

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SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Proudlock, Johnathon

ID: 1000010719288 DOB: 5/12/1996

Use Note Creation Time

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7/27/2023
3:02 AM

Case Management Note (SOS)

Presenting Problem:
Anxiety is still experienced by Mr. Proudlock.
Symptoms of depression continue to be described.
Mr. Proudlock continues to experience mood swings.
Mr. Proudlock continues to experience symptoms of psychotic process.

Recent history ;

Client has a history of chronic homelessness, substance and alcohol abuse, financial instability, unemployment. Struggles with extreme poverty, exposure to diseases, schizoaffective disorders, paranoia hallucinations.

Social Support Changes:
Mr. Proudlock's family or social support network has occurred no changes.

Therapeutic intervention ;

Johnathon was assisted in acquiring a cup of milk from the kitchen, so that he could have a drink, to help settle him. Client asked if there was anything to eat, and was offered a cup of ramen. Johnathon took the ramen, and ate a few bites before returning to his mat to lay down.

Assessment ;

BEHAVIOR:
Compliance with medication is good. He is paying less attention to self care. His ability to do domestic tasks is impaired and assistance is needed. He is socially isolated. His functioning at work is impaired. There are no early signs of substance abuse relapse and sobriety has been maintained. His academic and social performance in school is marginal. Some anger has been displayed. Impulsive behaviors are being displayed less frequently. Mr. Proudlock has normal food and fluid intake. Mr. Proudlock is almost always confused.

Mr. Proudlock presents as calm, Mr. Proudlock presents as guarded, inattentive, minimally communicative, disheveled, normal weight, and slow to respond. His speech is monotonal,slow, and soft. Language skills cannot be assessed. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. Suicidal ideas are convincingly denied.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis :

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Men's Transitional Home- Deming
416 S. Silver St
Deming, NM 88030

575-936-4177
575-936-4251

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Proudlock, Johnathon

7/26/2023 12:19 AM

ID: 1000010719288 DOB: 5/12/1996

Progress Note (Non-Rx) (Deming- Men's Transitional Home)

Client has experienced or is experiencing the following: Client says he is hungry and tired and hot!
Client has not showered in a week and doesn't want to shower, he has a very strong odor and he needs to change clothes, I worry about his health with this kind of hygiene issues.

Client refuses to go to his house says he doesn't feel safe there and there are people he doesn't know there that tell him he has to leave, I will be taking him to his house and find out if any one is there and have them leave if there is. If I can get him to shower my supervisor Christina LCSW is going to have him go back to the shelter in Silver City with her if he would like to go.

BEHAVIOR:
He has stopped taking prescribed medication. He needs assistance or cues for self care tasks. His ability to do domestic tasks is impaired and he is dependent on others. His relationships with family and friends have ceased. His use of substances has increased to an amount that is greater than advised. Some angry outbursts are occurring. Impulsive behaviors are occurring, but less frequently. Mr. Proudlock has diminished food and fluid intake. Mr. Proudlock is sometimes confused.
Provided coaching by discussing emotional reactions to an event, discussing barriers and strengths.

Client did shower and changed clothes and also went to the shelter in Silver City looking to find help there with housing issues, isolation issues, and quit using illicit drugs.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Other schizoaffective disorders, F25.8 (ICD-10) (Active)
Discord with neighbors, lodgers and landlord, Z59.2 (ICD-10) (Active)
Contact with and (suspected) exposure to other communicable diseases, Z20.89 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

LEVEL OF CARE JUSTIFICATION:
Mr. Proudlock continues to need outpatient treatment. He continues to exhibit symptoms of an emotional disorder that interfere with day to day functioning and requires continued treatment.

BARRIERS
- Increase social support system
- Assist in finding community support

Service Location

Turn

Audit Log

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Use Note Creation Time
Clear Time
Set Date/Time

7/23/2023
12:36 AM

Proudlock, Johnathon

ID: 1000010719288 DOB: 5/12/1996
Case Management Note (SOS)

Presenting Problem:
Mr. Proudlock continues to experience symptoms of psychotic process. confusion

Social Support Changes:
No changes in his family or social support network have occurred.

Recent History:
Client is impaired in the functional domain(s) of:
working
learning
Independent living
recreation

Client is impaired in most domains and fulfilling them is challenging

Client is combative with staff, officers, and sometimes other clients.

THERAPEUTIC INTERVENTION: Client was offered comfort as he became frightened by another client who offered him food as he was sleeping. Client was de escalated by reminding him that he was safe. Client was asked if he would like to step outside so that he could breathe fresh air. Client explained he was having mild hallucinations. Client was offered reality testing and was shown that the internal stimuli he was encountering could only be observed by himself. Therapeutic efforts today included the goal of improving reality testing.

Assessment: Client had difficulty maintaining eye contact and answered questions in unsure repetitive sentence fragments. Client seemed to calm himself after staff spoke with him and offered him reassurance that he was safe.

Client was encouraged to speak with staff openly about any subject he would like in order to distract his thoughts. Client has broken sleep patterns. Client can be observed standing in a fixed gaze for long periods of time.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Other schizoaffective disorders, F25.8 (ICD-10) (Active)
Discord with neighbors, lodgers and landlord, Z59.2 (ICD-10) (Active)
Contact with and (suspected) exposure to other communicable diseases, Z20.89 (ICD-10) (Active)

Service Location
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7/30/23, 5:05 PM

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Use Note Creation Time
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7/22/2023
1:49 AM

Proudlock, Johnathon

ID: 1000010719288 DOB: 5/12/1996
Case Management Note (SOS)

Service Location
Turn

Audit Log
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Presenting Problem:
Symptoms of psychosis continue to be described. inappropriate affect

Social Support Changes:
Mr. Proudlock's family or social support network has occurred no changes.

Recent History: Client is impaired in the functional domain(s) of:
learning
working
Independent living
Recreation
socializing

Client's mental disorder makes functioning in all of the domains challenging.

Brief stays in jail
Violent behavior
Command hallucination

THERAPEUTIC INTERVENTION: This session the therapeutic focus was on building self-esteem.
Client was attempted to be persuaded into socializing with his peers. He was offered encouragement to participate in the daily activity room. Support and structure was given as part of today's session. Client was provided food and drink multiple times throughout the shift. Client was monitored to ensure he was safe and those around him were safe.

Assessment

BEHAVIOR:
His self care skills are impaired and he needs assistance or cues. He needs assistance with domestic tasks. His relationships with family and friends have ceased. There are no early signs of substance abuse problems. Some angry outbursts are occurring. Impulsive behaviors are occurring, but less frequently. Mr. Proudlock has normal food and fluid intake. Mr. Proudlock is almost always confused.

Client is minimal in his speaking and his affect is considered inappropriate. He stares into space for long periods of time. He is gentle as he speaks. He stands in fixed position with his shoulders slightly rolled forward.

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Chart Room

Back To Report

Photo

Ther. Groups

Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Rodriguez, Melissa

Supp.

ED Visit

This is the Chart Face for: Rodriguez, Melissa

ID: 10000

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)

Depressive episode, F32 (ICD-10) (Active)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 14

1) 7/30/23 RD

Case Management Note (SOS)

SOS

Presenting Problem:

Anxiety is still experienced by Ms. Rodriguez. Depressive symptoms continue as well as symptoms of PTSD

2) 7/30/23 RD

Case Management Note (SOS)

SOS

Presenting Problem:

Ms. Rodriguez continues to experience anxiety. Symptoms of depression continue to be described.

3) 7/30/23 RD

Case Management Note (SOS)

SOS

Presenting Problem:

Ms. Rodriguez continues to exhibit symptoms of a conduct dis established rules. Ms. Rodriguez continues to experience mood swings.

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

1 of 1

7/30/23, 5:08 PM

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Behavioral Health EHR

Continue

Photo

Chart Details

Rodriguez
Patient

Demographics

Anaphylactic Reaction Reported ☐

Patient Information

*Name (F,M,L,Suffix) **Melissa Rodriguez**

☒ Homeless Address **42 Coleman Dr.**

☐ Bad Address Addr 2 / Appt # County **Grant**

☐ Sample Chart City, State, Zip **Silver City**

Best Phone Home Phone Country **US**

☐ Home Cell Phone

☐ Work Work Phone ext

☐ Cell

Patient Status

☒ Active

☐ Inactive

☐ Pending

API ☐

Appt Reminders via: ☐ Email ☐ Text Message ☐ Phone Message

Employment Status

School or Employer

Grade

Marital Status

Sexual Orientation

*Ethnicity **Hispanic or Latino**

Ethnicity 2 **more**

Religion

Annual Household Income

Family Size

Veteran ☐ Y ☐ N

*Race **White**

Race 2

*Preferred Language

Disability

Native American ☐ Y ☐ N Tribal Affiliation

Insurance Information

*Date of Birth **12/20/1980**

Unique Patient ID **1000010723120**

*Gender **woman**

Refer to patient as **Ms. Rodriguez**

SSN # **569-65-7205**

Alt. Patient ID

Other Names

Previous Address

Patient's Condition

Date Of Current Illness Onset

Date of Current Admission: From

Dates Unable To Work: From

Condition Related To Employment? ☐

Condition Related To Auto Accident? ☐

Condition Related To Other Accident? ☐

In treatment Previously? ☐ Y ☐ N If yes, whe

Date Of Death Preliminary Car

Release of Info

Patient Calendar Note

Assigned Providers

are allowed to sign Notes for this Patient

Karissa Andazola, CSW Role **X** **Principal**

< Select a Clinician >

< Multiple Clinicians >

Assign Provider(s)

Where Seen

Med Rec

SPIN Supporting

Add New Location

Show Fields used by elec

Red fields are required **Blue fields are optional but add info to clinical note.**

*** = Required for Meaningful Use** **✓ = Patient Has Accessed Portal**

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Clear Time
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7/30/2023
3:18 PM

Rodriguez, Melissa

ID: 1000010723120 DOB: 12/20/1980

Case Management Note (SOS)

Presenting Problem:
Anxiety is still experienced by Ms. Rodriguez.
Depressive symptoms continue as well as symptoms of PTSD.

Recent History:
Client has a history of chronic homelessness, unemployment, substance abuse, depression, anxiety, and PTSD.

Social Support Changes:
The following changes in Ms. Rodriguez's family or social support network have occurred: Melissa has recently started participating in an I.O.P program.

Intervention:
Client was assisted with hygienic necessities so that she may shower and maintain proper self care.

Assessment:
Ms. Rodriguez appears calm, friendly, attentive, communicative, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Insight into problems appears normal. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Ms. Rodriguez's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

Diagnosis: Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Depressive episode, F32 (ICD-10) (Active)

History of Risk Factors:
*History of Abuse:
Physical abuse
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Absent or Weak Support System:
Has had Serious Problems with or Loss of a Significant Other
*Substance Abuse is a Current Problem

Suicide Risk Assessment:
She denies suicidal ideas or intentions

Service Location
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7/30/23, 5:09 PM

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Rodriguez, Melissa

ID: 1000010723120 DOB: 12/20/1980

Case Management Note (SOS)

Use Note Creation Time
Clear Time
Set Date/Time
7/30/2023
12:53 PM

Presenting Problem:
Ms. Rodriguez continues to experience anxiety.
Symptoms of depression continue to be described.

Recent History: Client has a history of chronic homelessness, unemployment, anxiety, depression, stress, substance use, and poverty.

Social Support Changes:
No changes in her family or social support network have occurred.

Intervention:
Provided access to the laundry room for client so that she may be able to get a load of laundry going. Assisted client with hanging up clothes on the clothes line.

Assessment:
Ms. Rodriguez appears calm, happy, attentive, communicative, casually groomed, over weight, and relaxed. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Affect is appropriate, full range, and congruent with mood.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Depressive episode, F32 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Anger Management Problems

Current Risk Factors:
*Experiencing Severe Anxiety or Panic
*A Major Depression is Present
*Severe Financial Difficulty
*Severe Insomnia is Present

Suicide Risk:
Based on the above risk factors, Ms. Rodriguez's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

2 Units for H0038 Peer Support - HM, TV

Service Location

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Rodriguez, Melissa

ID: 1000010723120 DOB: 12/20/1980

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023
6:14 AM

Presenting Problem:
Ms. Rodriguez continues to exhibit symptoms of a conduct disorder. Ms. Rodriguez does not follow the established rules.
Ms. Rodriguez continues to experience mood swings.

Social Support Changes:
The following changes in Ms. Rodriguez's family or social support network have occurred:
Client has recently started participating in an IOP program.

Recent History: Client is impaired in the functional domain(s) of:
working
learning
Independent living

PTSD
Depressive episodes

prior substance use (amphetamines)

THERAPEUTIC INTERVENTION: This session part of the therapeutic focus was on improving limit setting and boundaries.
Client left facility just after curfew in which she was reminded she would not gain reentry into the building until 6 am. Client presented herself early by more than 30 minutes. She was denied entry and was advised to be more mindful of the time. Client also did not leave the shelter grounds after she denied entry, which is not permitted. She was instructed that she could return at 6 am.

Assessment: She was appropriate in behavior. Client was casual appearance and her insight and judgment appear to be fair. Client denies homicidal thoughts or suicidal ideations.

Client was encouraged to keep in alignment with the stipulations of her probation's office requirements.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Depressive episode, F32 (ICD-10) (Active)

Service Location

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SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Rodriguez, Melissa

ID: 1000010723120 DOB: 12/20/1980

Case Management Note (SOS)

Use Note Creation Time
Clear Time
Set Date/Time

7/30/2023
4:31 AM

Service Location
Turn

Audit Log

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Presenting Problem:

She continues to experience symptoms of anxiety.
Symptoms of depression continue to be described.
Symptoms of conduct disorder continue to be described. She often violates the rules. Ms. Rodriguez lies to others routinely. Ms. Rodriguez steals things from others.
Symptoms of mood swings continue to be described.
Ms. Rodriguez continues to be oppositional and defiant. Symptoms of argumentativeness continue to be described. Ms. Rodriguez continues to be defiant.
Substance use symptoms continue.

Recent history ;

Client has a history of reoccurring homelessness, unemployment, substance and alcohol abuse, financial instabilities. Struggles with anxiety, depression, extreme poverty, an adjustment disorder.

Social Support Changes:

No changes in her family or social support network have occurred.

Therapeutic intervention ;

Client was reminded, after being seen with a puppy, that animals were not allowed at the shelter, and she would have to find somewhere else for it to be. Client was defiant to start, arguing with staff on how the animal was an emotional support animal, but when asked for paperwork to prove this, client was unable to provide. Staff reiterated that the rules were set, and to stay, she would have to follow them. Client left shortly after, and had not returned that night.

Assessment ;

BEHAVIOR:

Compliance with medication is good. Her self care skills are intact. Her domestic skills are intact and unimpaired. Her relationships with family and friends are normal. Her functioning at work is marginal. There are early signs of substance abuse problems. Her academic and social performance in school is marginal. There have been some outbursts or expressions of anger. Impulsive behaviors are occurring, but less frequently. Ms. Rodriguez has normal food and fluid intake. Ms. Rodriguez has not been confused.

Ms. Rodriguez presents as angry, Ms. Rodriguez appears guarded, attentive, minimally communicative, well groomed, normal weight, and tense. and looks unhappy. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. She appears downcast. Facial expression and general demeanor

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Rodriguez, Melissa

ID: 1000010723120 DOB: 12/20/1980

Case Management Note (SOS)

Use Note Creation Time
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7/29/2023
5:34 PM

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Presenting Problem:
Anxiety is still experienced by Ms. Rodriguez.
Ms. Rodriguez continues to experience depression as well as symptoms of PTSD.

Recent History:
Client has a history of chronic homelessness, unemployment, substance abuse, depression, anxiety, and PTSD.

Social Support Changes:
No changes in Ms. Rodriguez's family or social support network have occurred.

Intervention:
Client was assisted with retrieving her mail today.

Assessment:
Ms. Rodriguez appears friendly, communicative, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Insight into problems appears normal. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Ms. Rodriguez's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

Diagnosis: Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Depressive episode, F32 (ICD-10) (Active)

Current Risk Factors:
*A Major Depression is Present

Suicide Risk Assessment:
She denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Ms. Rodriguez's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Ms. Rodriguez's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive

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Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Find

Melissa Rodriguez
(12/20/1980) #1000010723120
Account ID# 13587447

Chart Face

Demographics

Make Appoi

Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$1,588.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$1,588.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$1,588.00	Not A

Account Detail

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/30/2023 H2015 Comprehensive Community Ryan Dingess, CSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/29/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/28/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/15/2023 H0038 Peer Support Group Lawren Davenport, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/14/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/14/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00

Refresh All From Note

Add Late Fee

Sign Out Edit View Format Reports Chat/Help

Chart Room Last Chart Calendar Patients assigned to you are highlighted

Patient Records

Total Patient Count: 1478

Only Applies to New Patient Report

Applies to All & New Patient Reports

From: 7/29/2023 To: 7/30/2023

Site name:

Include: ☒ All Patients.
☐ Patients WITH treatment plans only.
☐ Patients WITHOUT treatment plans only.

Show All Patients

Show New Patients Added >>

Export

Print

	Patient Name	Unique ID	Last Exam	Clinician	Status	Date of Current Illness	Re
\$	Proudlock, Johnathon	1000010719288	7/30/2023	Michelle Grayless, MSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Rodriguez, Melissa	1000010723120	7/30/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Marquez, James A	1000010725338	7/30/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Armendariz Barela, Eva	1000010729151	7/30/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Howser, Dorothea	1000010730077	7/30/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Haley, Shelly	1000010733986	7/30/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Peters, Eric	1000010736057	7/30/2023	Jeffrey Finer, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Lopez, Henry	1000010738264	7/30/2023	Kathy Quarrell, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Sprague, David S	44	7/30/2023	Tomas Sandoval, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Sanders, Crystal	46	7/30/2023	Joy Leatherman, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Radan, Robert	108	7/30/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Madrid, Bernie	119	7/30/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Pence, Victoria	140	7/30/2023	Daniella Ramirez, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Attson, Stephanie	151	7/30/2023	Karissa Andazola, CSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Yazzie, Joshua	153	7/30/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	McKee Young, Danny Rey	1000010699747	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Lazzell, Shanti	1000010700116	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Hartsfield, Christopher	1000010716171	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Porras, Jose	1000010718034	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Eddington, Lynn	1000010729150	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Yniguez, Thomas J	1000010731328	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Johnson, Pamela	1000010735999	7/29/2023	Christina Wolford, LCSW	<input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/> Pending		
€	Gooden, Kelvin D	1000010736141	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		

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Patients assigned to you are **highlighted**

Patient Records

Total Patient Count: 1478

Only Applies to New Patient Report

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Site name:

Include: ☒ All Patients.
☐ Patients **WITH** treatment plans only.
☐ Patients **WITHOUT** treatment plans only.

Show All Patients

Show New Patients Added >>

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Patient Name	Unique ID	Last Exam	Clinician	Status	Date of Current Illness	Re
\$ Gooden, Kelvin D	1000010736141	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Taliferro, Miya	1000010739075	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Avelar, Michael	1000010739576	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Jackson, Charles	11	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Yniguez, Maisie	31	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Griego, Jr., Leroy	33	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Ruiz, Richard	70	7/29/2023	Tomas Sandoval, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Kilbourne, Liane	84	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Romero, Andrew	94	7/29/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Griego, Christopher	100	7/29/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Bridges, Josh	103	7/29/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Rocha, Anthony	139	7/29/2023	Jeffrey Finer, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Hoy, Wyatt	147	7/29/2023	Jeffrey Finer, CPSW, CSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Sierra, Caesar I	1000010739315	7/28/2023	Joy Leatherman, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Rosales, Mary H	35	7/28/2023	Tomas Sandoval, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Duva, Danielle	64	7/28/2023	Joy Leatherman, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Duran, John	128	7/28/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Dominguez, Joseph	1000010711485	7/27/2023	Michelle Grayless, MSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Dominguez, Ernesto	1000010717476	7/27/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Padilla, Juan	1000010719621	7/27/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Brewer, Molynda	1000010720778	7/27/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Otero, Angela	1000010729846	7/27/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		

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Total Patient Count: 1478

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Applies to All & New Patient Reports

Include: ☒ All Patients.
☐ Patients **WITH** treatment plans only.
☐ Patients **WITHOUT** treatment plans only.

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	Patient Name	Unique ID	Last Exam	Clinician	Status	Date of Current Illness	Re
\$	Otero, Angela	1000010729846	7/27/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	McAllister, Mark	1000010734998	7/27/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Crouthamel, Brian	101	7/27/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Foster, Dana	105	7/27/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Dominguez, Luis	152	7/27/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Brogdon, Delia	155	7/27/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Mudry, Crystal	1000010690657	7/26/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Tatom, Cody R	1000010722270	7/26/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Sierra, Erik	1000010722774	7/26/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Flores, Cristine	1000010736895	7/26/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Escobar, Nancy	129	7/26/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Reynoso, Patrick	150	7/26/2023	Veronica Diaz, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Gallegos, Vincent	1000010717470	7/25/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Hernandez, Jimmy	1000010729605	7/25/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Hobbs MacFarlane, Carrie	1000010729845	7/25/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Carbajal, Stefani	1000010731539	7/25/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Ybarra, Martin M	1000010732805	7/25/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Ellis, Michael	131	7/25/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Michel, Toby	1000010690890	7/24/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Grado, Antonio	1000010717287	7/24/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Cummins, Sheldon	1000010717897	7/24/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Gonzales, Lupe	1000010720702	7/24/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Gonzales, Irma	1000010731411	7/24/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		

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To: 7/30/2023

Show All Patients Show New Patients Added >> Export Print

Patient Name	Unique ID	Last Exam	Clinician	Status	Date of Current Illness	Re
\$ Gonzales, Irma	1000010731411	7/24/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Hernandez, Charles	122	7/24/2023	Veronica Diaz, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Murillo, Ruben	1000010733101	7/23/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Valenzuela, Maryjane	14	7/23/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Tafoya, Chris	71	7/23/2023	Tomas Sandoval, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Baker, Nathan	1000010706273	7/22/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Romero, Caesar	49	7/22/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Herrera, Eddie	1000010719247	7/21/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Ludwig, Edward	1000010733466	7/21/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Wilson, Christina	144	7/21/2023	Veronica Diaz, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Prevost, Michael	120	7/20/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Watt, Sharon	133	7/20/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Flores- Romero, Virginia	141	7/20/2023	Daniella Ramirez, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Yates, Elizabeth	99	7/19/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Pflanz, Kristina	121	7/19/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Brannan, Billy O	1000010718447	7/18/2023	Michelle Grayless, MSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Corrales, Lisa	1000010729906	7/18/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ White, Michael	1000010739393	7/18/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Haynes, Cherokee	106	7/18/2023	Daniella Ramirez, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Fiorentino, Charles	1000010713573	7/17/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Cyrus, Sarah	1000010727962	7/17/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Barraza, Victoria M	1000010729381	7/17/2023	Michelle Grayless, MSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Haggeman, Jessica	70	7/17/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		

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Patient Records

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☐ Patients **WITHOUT** treatment plans only.

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	Patient Name	Unique ID	Last Exam	Clinician	Status	Date of Current Illness	Re
\$	Cyrus, Sarah	1000010727962	7/17/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Barraza, Victoria M	1000010729381	7/17/2023	Michelle Grayless, MSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Haassman, Jessica	79	7/17/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Rivera, Matias	1000010728761	7/16/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Marquez Duarte, Martha	1000010735990	7/16/2023	Kathy Quarrell, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Gomez, Frank	1000010691420	7/15/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Ramos, Javier	1000010692039	7/14/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Murillo, Angelica	1000010716066	7/14/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Regalado, Malissa	1000010727003	7/14/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Davis, Kenneth	1000010728668	7/14/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	McDowell, Leigh	1000010735521	7/14/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Dill, Tammy	123	7/14/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Alcorta, Anthony H	138	7/14/2023	Joy Leatherman, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Miller, Lisa A	1000010729911	7/13/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Munoz, Roxann M	1000010732979	7/13/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Roach, Amber D	1000010735349	7/13/2023	Kathy Quarrell, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Muniz, Jeramiah S	1000010736210	7/13/2023	Kathy Quarrell, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Mariscal, April	111	7/13/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Hodges, Chyanne	124	7/13/2023	Jesse Berkowitz, LMSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Maldonado, Byron	136	7/13/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Arambula, Ramon	1000010727917	7/12/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Baker, Johnnie Ann	135	7/12/2023	Veronica Diaz, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$	Carbajal, Ronnie J	1000010691004	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		

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Patient Records

Total Patient Count: 1478

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Patient Name	Unique ID	Last Exam	Clinician	Status	Date of Current Illness	Re
\$ Carbajal, Ronnie J	1000010691004	7/11/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Hand, Nancy	1000010729834	7/11/2023	Michelle Grayless, MSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Smith, Elijah	1000010734234	7/11/2023	Kathy Quarrell, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Meraz, Esmerelda	1000010735826	7/11/2023	Joy Leatherman, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Hayes, Christopher	1000010733677	7/10/2023	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Robles, Joshua F	1000010735614	7/10/2023	Jeffrey Finer, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Martinez, Seniada	88	7/10/2023	Daniella Ramirez, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Sanders, Kimberly	132	7/10/2023	Veronica Diaz, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Groves, Kliff	1000010707385	7/9/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Naef, Kathleen M	1000010717651	7/9/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Johnson, Prentis	1000010738194	7/9/2023 12:00	Joy Leatherman, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Hernandez, Amanda	1000010724558	7/8/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Hamlett, Raymond	81	7/8/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Versteeg, Amber	116	7/8/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Sierra, Alexander	1000010690667	7/7/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Flores, Grisel	1000010725655	7/6/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Carbajal, Yvonne	1000010720033	7/5/2023 12:00	Michelle Grayless, MSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Castillo, Jerry	1000010726399	7/5/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Martinez, Patsy	1000010733674	7/5/2023 12:00	Kathy Quarrell, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Rodriguez, Myra K	1000010739513	7/5/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Trujillo, Veronica	98	7/5/2023 12:00	Veronica Diaz, CPSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Cardona, John J	1000010724838	7/3/2023 12:00	Christina Wolford, LCSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		
\$ Carr, Melody	1000010720033	7/2/2023 12:00	Michelle Grayless, MSW	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		

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Due: 9/24/20

Delet Entire

Marquez, James A

This is the Chart Face for: **Marquez, James A** ID: 1000010725338 DOB: 3/16/2000 23 Y

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Adjustment disorder, unspecified, F43.20 (ICD-10) (Active)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:
History of alcohol abuse and dependence.
History of chronic homelessness
History of trauma and abuse

Chart Reminders

Supp.

ED Visit

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 89 of 89 Notes

1) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
Symptoms of mood swings continue to be described.
Symptoms of conduct disorder continue to be described. Violation of rules is frequent. He starts fights with others.

2) 7/29/23 LD Group Therapy Note (SOS) SOS Compiled Note Work Areas

Time spent face to face with patient and/or family and coordination of care: 180 min
Session start: 11:00 AM
Session end: 2:00 PM

3) 7/22/23 LD Group Therapy Note (SOS) SOS Compiled Note Work Areas

Time spent face to face with patient and/or family and coordination of care: 180 min
Session start: 8:00 AM
Session end: 11:00 AM

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Clinical Msg

Rx Called In

Med Pickup

*Reminders

Send a Message

Calendar

Appt History

\$ Account

Acti

Inac

Pen

Sign Out

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Behavioral Health EHR

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Chart Face

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Show Notes in List

SOS

610 N. Silver St

Silver City, NM 88061

575-956-6131

575-956-6947

Medicaid ID: YIF905344441

Marquez, James A

ID: 1000010725338 DOB: 3/16/2000

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023

2:32 AM

Service Location

Turn

Audit Log

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Presenting Problem:

Symptoms of mood swings continue to be described.

Symptoms of conduct disorder continue to be described. Violation of rules is frequent. He starts fights with others.

Recent history ;

Client has a history of reoccurring homelessness, alcohol abuse, financial instability, and criminal institutionalization. Struggles with alcohol abuse, seizures, anxiety, depression, rapid mood shifts, an adjustment disorder, and extreme poverty.

Social Support Changes:

James's family or social support network has occurred no changes.

Therapeutic intervention ;

Client was prompted to return to his area for the night, once midnight had hit. Staff reminded him that quiet hours begin at midnight, and the television would be shut off, so that people may rest better, and be prompted to go to their areas once things settled.

Assessment ;

BEHAVIOR:

Medication has been taken regularly. His self care skills are intact and unimpaired. His domestic skills are intact and unimpaired. His relationships with family and friends are normal. He is performing normally at work. His use of substances has increased. His school performance is normal. Some angry outbursts are occurring. There have been fewer instances of impulsive behaviors. James has normal food and fluid intake. James has not been confused.

James presents as calm, James presents as friendly, attentive, communicative, casually groomed, normal weight, and relaxed. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. The patient convincingly denies suicidal ideas or intentions.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis ;

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7/30/23, 5:17 PM

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Show Notes in List

SOS

610 N. Silver St

Silver City, NM 88061

575-956-6131

575-956-6947

Medicaid ID: YIF905344441

Marquez, James A

ID: 1000010725338 DOB: 3/16/2000

Case Management Note (SOS)

7/30/2023

2:32 AM

Use Note Creation Time

Clear Time

Set Date/Time

Service Location

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Diagnosis ;

Adjustment disorder, unspecified, F43.20 (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse

*History of Anger Management Problems

*History of Mental Illness:

History of Severe Anxiety or Panic Attacks

Carries a Diagnosis of Manic Depressive Illness

Current Risk Factors:

*A Major Depression is Present

*Severe Financial Difficulty

*Impaired Impulse Control

Protective Factors:

*History of Ability to Cope with Stress

*Cooperative and Willing to Accept Help

*Good Family Support

*Has Reasons for Living

*Feelings of Responsibility to Children, Family, or Loved Others

*Strong Social Support System

Suicide Risk Assessment:

James denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, James's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, James's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:

Access to lethal means was discussed with James. He denies having access to lethal means at this time.

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7/30/23, 5:19 PM

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Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

James A Marquez

(3/16/2000) #1000010725338

Account ID# 13589665

Additional Patient Information

Find

Chart Face

Demographics

Make Appoi

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options

☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$1,286.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$1,286.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$1,286.00	Not A

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/29/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/22/2023 H0038 Peer Support Joy Leatherman, CPSW	45.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$45.00	\$0.00
7/22/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/18/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/17/2023 H2015 Comprehensive Community Joy Leatherman, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/15/2023 H0038 Peer Support Group Lawren Davenport, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/15/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/14/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00

Refresh All From Note

Add Late Fee

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Behavioral Health EHR

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Show Notes in List

SOS

610 N. Silver St

Silver City, NM 88061

575-958-6131

575-958-6947

Use Note Creation Time

Clear Time

Set Date/Time

Medicaid ID: Y1F905344441

Marquez, James A

ID: 1000010725338

DOB: 3/16/2000

7/29/2023

2:05 PM

Group Therapy Note (SOS)

Time spent face to face with patient and/or family and coordination of care: 180 min

Session start: 11:00 AM

Session end: 2:00 PM

Session Remarks:

Therapy Type:

Cognitive Behavioral Therapy

Thought Field Therapy

Motivational Interviewing

Today's group it started with a mood check in. Everyone discussed their current mood and how it was different or the same as yesterday. We reviewed goals from last week and discussed progress and next steps. We decided on an afternoon topic and divided the preparation of lunch and prepared it as a group. The afternoon session we explored how our thoughts and feelings influence our behaviors, choices, and outcomes. Group explored fears, hopes, and thinking patterns. Explored the five senses and how it can help reducer anxiety.

Group Type:

Focus Group:

Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention.

Present Today:

Present at today's session were the following: 13 members.

Group Leader Interventions:

Encouraged exploration

Extrapolated to Life

Therapist provided support and structure

Plan:

Encourage Participation and Engagement

Continue Skill Development

Encourage increased participation.

Individual Remarks:

Appearance and Behavior:

In today's session James appeared flat, wary, minimally communicative, and tense.

Participation:

James was relatively inactive today and did not fully participate in discussions.

Service Location

Turn

Audit Log

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575-956-6947

Use Note Creation Time
Clear Time
Set Date/Time

7/29/2023
2:05 PM

Medicaid ID: YIF905344441

Marquez, James A

ID: 1000010725338 DOB: 3/16/2000

Group Therapy Note (SOS)

In today's session James appeared flat, wary, minimally communicative, and tense.

Participation:
James was relatively inactive today and did not fully participate in discussions.

Behavior:
James was relatively inactive, barely moving the entire group session.

Mental Status Exam: Displayed sad demeanor. Observed depressed thought content. Facial expression and body posture suggest an underlying depressed mood. He was glum and unanimated. Presented tense or worried.

Suicidal/Homicidal:
Suicidal ideas or intentions are not in evidence and were not expressed by James today. James convincingly denied homicidal ideas in today's session.

Stage of Change:
Precontemplation

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Adjustment disorder, unspecified, F43.20 (ICD-10) (Active)

HEALTH CONCERNS AND RISKS:
History of alcohol abuse and dependence.
History of chronic homelessness
History of trauma and abuse

12 Units for H0038 Peer Support

Lawren Davenport, CPSW

Electronically Signed
By: Lawren Davenport, CPSW

Service Location
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PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Clinical Order Sheets

Treatment

Due: 10/8/20

Delet

Entire

This is the Chart Face for: **Armendariz Barela, Eva** ID: 1000010729151 DOB: 6/19/1972 51 Y

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)

Adjustment disorder with mixed anxiety and

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

Chart Reminders

Supp.

ED Visit

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 31 of 31 Notes

1) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:

Adjustment disorder.

Eva continues to experience anxiety.

Symptoms of depression continue to be described.

2) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:

Eva continues to experience anxiety.

Symptoms of conduct disorder continue to be described. She often violates the rules. She lies frequently.

3) 7/29/23 LD Group Therapy Note (SOS) SOS Compiled Note Work Areas

Time spent face to face with patient and/or family and coordination of care: 180 min

Session start: 11:00 AM

Session end: 2:00 PM

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Clinical Msg

Rx Called In

Med Pickup

*Reminders

Send a Message

Calendar

Appt History

\$ Account

Acti

Inac

Pen

Sign Out Edit View Format Chat/Help		Patier	
ICANotes Behavioral Health EHR		Continue	Photo
		Chart Details	Armendariz Barela, Eva 10000107
		Go to E-Prescribe	Patient's Name 51 Yrs Patient's ID
Demographics		DOB 6/19/1972	
Anaphylactic Reaction Reported <input type="checkbox"/>		Patient Reviewed Demographics	
Patient Information		Insurance Information	
*Name (F,M,L,Suffix) Eva Armendariz Barela		*Date of Birth 6/19/1972 Age: 51	
<input type="checkbox"/> Homeless Address 610 N. Silver		Unique Patient ID 1000010729151	
<input type="checkbox"/> Bad Address Addr 2 / Appt #		*Gender woman *Sex: F Red fields are	
<input type="checkbox"/> Sample City, State, Zip Silver City NM 88061		Refer to patient as Eva	
<input type="checkbox"/> Chart Best Phone Home Phone Country US		SSN # 546-17-0134	
<input type="radio"/> Home Cell Phone (575)590-8253		Alt. Patient ID	
<input type="radio"/> Work Work Phone ext		Room:	
<input type="radio"/> Cell Email		MAR <input type="checkbox"/> API	
Patient Status		Other Names	
<input checked="" type="radio"/> Active		Previous Address	
<input type="radio"/> Inactive			
<input type="radio"/> Pending			
API <input type="checkbox"/>		Patient's Condition	
Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message		Date Of Current Illness Onset Date Of Similar Illness	
Employment Status		Date of Current Admission: From To	
School or Employer		Admitting DX	
Grade		Dates Unable To Work: From To	
Marital Status partnered (living with)		Condition Related To Employment? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Sexual Orientation		Condition Related To Auto Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	
*Ethnicity Hispanic or Latino		Condition Related To Other Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Ethnicity 2 more		In treatment Previously? <input type="radio"/> Y <input type="radio"/> N If yes, where?	
Religion		Date Of Death Preliminary Cause	
Annual Household Income		Release of Info	
Family Size		Adv. Dir.	
Veteran <input type="radio"/> Y <input type="radio"/> N		Miscellaneous	
*Race		Notes	
Race 2		Custom Fields	
*Preferred Language English			
Disability			

Sign Out

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Behavioral Health EHR

Chart Room

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Show Notes in List

SOS

610 N. Silver St

Silver City, NM 88061

575-958-6131

575-958-6947

Medicaid ID: YIF915103969

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023

2:17 PM

Armendariz Barela, Eva

ID: 1000010729151 DOB: 6/19/1972

Case Management Note (SOS)

Service Location

Turn

Audit Log

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Presenting Problem:

Adjustment disorder.

Eva continues to experience anxiety.

Symptoms of depression continue to be described.

Recent History:

Client has a history of chronic homelessness, unemployment, substance abuse, anxiety, depression, PTSD, and impairment in the functional domains of independent living, working, and recreation.

Social Support Changes:

No changes in her family or social support network have occurred.

Intervention:

Client was assisted with hygienic necessities today, client was also assisted with with accessing the laundry room so she may find clean clothes and maintain proper self care.

Assessment:

Eva appears flat, minimally communicative, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood cannot be assessed. There are no signs of hyperactive or attentional difficulties. Eva made poor eye contact during the examination.

Plan:

Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

Diagnosis: Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)

Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

History of Risk Factors:

*History of Abuse:

Physical abuse

*History of Alcohol or Substance Abuse

Current Risk Factors:

*Absent or Weak Support System:

*Experiencing Severe Anxiety or Panic

*Severe Financial Difficulty

*Feelings of Hopelessness, Worthlessness, or Guilt are Present

Affect Flat or Blunted

*Rapid Shifts in Mood are Occurring

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7/30/23, 5:26 PM

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575-956-6947

Medicaid ID: YIF915103969

Use Note Creation Time
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7/30/2023
2:17 PM

Armendariz Barela, Eva
ID: 1000010729151 DOB: 6/19/1972
Case Management Note (SOS)

History of Risk Factors:
*History of Abuse:
Physical abuse
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present
Affect Flat or Blunted
*Rapid Shifts in Mood are Occurring

Suicide Risk Assessment:
Eva denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Eva's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Eva's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Eva. She denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - TV

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 2:00 PM
Session end: 2:15 PM

T.Y.
Ryan Dingess, CSW
Electronically Signed
By: Ryan Dingess, CSW

Service Location

Audit Log

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SOS
810 N. Silver St
Silver City, NM 88061
575-958-6131
575-958-6947

Use Note Creation Time
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Set Date/Time
7/30/2023
4:21 AM

Medicaid ID: YIF915103969

Armendariz Barela, Eva

ID: 1000010729151 DOB: 6/19/1972

Case Management Note (SOS)

Presenting Problem:

Eva continues to experience anxiety.
Symptoms of conduct disorder continue to be described. She often violates the rules. She lies frequently.
Symptoms of mood swings continue to be described.
Eva continues to experience depression.

Recent history ;

Client has a history of reoccurring homelessness, unemployment, financial instability, substance and alcohol abuse. Struggles with extreme poverty, an adjustment disorder with anxiety and depressive like symptoms, substance abuse, post-traumatic stress disorder.

Social Support Changes:

No changes in her family or social support network have occurred.

Therapeutic intervention ;

Client was prompted to return to her mat, and quiet down for the night, well after midnight had passed. Staff reminded client that it was quiet hours, implying that it was the time for everyone to return to and remain in their designated sleeping areas until morning came, so that everyone may get a decent, proper amount of sleep, to wake again in the morning with no disturbance.

Assessment ;

BEHAVIOR:

Good medication compliance is noted. Her self care skills are impaired and she needs assistance or cues. She needs assistance with domestic tasks. She is socializing less with family and friends. Her work performance is marginal. There are signs of substance abuse problems. Her functioning in school is impaired. There have been more outbursts or expressions of anger. Impulsive behaviors are still occurring. Eva has normal food and fluid intake. Eva has not been confused.

Eva presents as flat, inattentive, minimally communicative, disheveled, over weight, and slow to respond. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. No suicidal ideas or intentions are present today.

Service Location

Turn

Audit Log

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061
575-958-6131
575-958-6947

Use Note Creation Time
Clear Time
Set Date/Time
7/30/2023
4:21 AM

Medicaid ID: YIF915103969

Armendariz Barela, Eva

ID: 1000010729151 DOB: 6/19/1972

Case Management Note (SOS)

BEHAVIOR:

Good medication compliance is noted. Her self care skills are impaired and she needs assistance or cues. She needs assistance with domestic tasks. She is socializing less with family and friends. Her work performance is marginal. There are signs of substance abuse problems. Her functioning in school is impaired. There have been more outbursts or expressions of anger. Impulsive behaviors are still occurring. Eva has normal food and fluid intake. Eva has not been confused.

Eva presents as flat, inattentive, minimally communicative, disheveled, over weight, and slow to respond. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. No suicidal ideas or intentions are present today.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis ;

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

History of Risk Factors:

- *History of Alcohol or Substance Abuse
- *History of Mental Illness:
 - Carries a Diagnosis of Manic Depressive Illness
 - History of Severe Anxiety or Panic Attacks

Current Risk Factors:

- *Agitated or Very Angry:
- *Experiencing Severe Anxiety or Panic
- *Carries a Bipolar Diagnosis
- *Severe Financial Difficulty
- *A Major Depression is Present
- *Impaired Impulse Control
- *Severe Insomnia is Present
- *Rapid Shifts in Mood are Occurring

Protective Factors:

- *History of Ability to Cope with Stress
- *Strong Social Support System

Service Location
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Medicaid ID: YIF915103969

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7/30/2023
4:21 AM

Armendariz Barela, Eva
ID: 1000010729151 DOB: 6/19/1972
Case Management Note (SOS)

*Agitated or very Angry.
*Experiencing Severe Anxiety or Panic
*Carries a Bipolar Diagnosis
*Severe Financial Difficulty
*A Major Depression is Present
*Impaired Impulse Control
*Severe Insomnia is Present
*Rapid Shifts in Mood are Occurring

Protective Factors:
*History of Ability to Cope with Stress
*Strong Social Support System
*Feelings of Responsibility to Children, Family, or Loved Others

Suicide Risk Assessment:
She denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Eva's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Eva's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Eva. She denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 2:15 PM
Session end: 2:30 PM

a.n.p

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location

Audit Log

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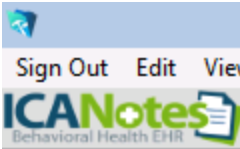
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Medicaid ID: YIF915103969

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7/29/2023

2:05 PM

Armendariz Barela, Eva

ID: 1000010729151 DOB: 6/19/1972

Group Therapy Note (SOS)

Time spent face to face with patient and/or family and coordination of care: 180 min

Session start: 11:00 AM

Session end: 2:00 PM

Session Remarks:

Therapy Type:

- Cognitive Behavioral Therapy
- Thought Field Therapy
- Motivational Interviewing

Today's group it started with a mood check in. Everyone discussed their current mood and how it was different or the same as yesterday. We reviewed goals from last week and discussed progress and next steps. We decided on an afternoon topic and divided the preparation of lunch and prepared it as a group. The afternoon session we explored how our thoughts and feelings influence our behaviors, choices, and outcomes. Group explored fears, hopes, and thinking patterns. Explored the five senses and how it can help reducer anxiety.

Group Type:

Focus Group: Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention.

Present Today:

Present at today's session were the following: 13 members.

Group Leader Interventions:

- Encouraged exploration
- Extrapolated to Life
- Therapist provided support and structure

Plan:

- Encourage Participation and Engagement
- Continue Skill Development
- Encourage increased participation.

Individual Remarks:

Appearance and Behavior:

In today's session Eva appeared flat, uncommunicative, and relaxed.

Participation:

Eva was relatively inactive today and did not fully participate in discussions.

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Medicaid ID: YIF915103969
Armendariz Barela, Eva
ID: 1000010729151 DOB: 6/19/1972
Group Therapy Note (SOS)

7/29/2023
2:05 PM

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In today's session Eva appeared flat, uncommunicative, and relaxed.

Participation:
Eva was relatively inactive today and did not fully participate in discussions.

Behavior:
Eva was relatively inactive, barely moving the entire group session. Provided coaching by discussing emotional reactions to an event, discussing barriers and strengths.

Mental Status Exam:
Eva's mood is difficult to assess today. There were no signs of anxiety.
There are no signs of hallucinations, delusions, thought disorder or other signs of psychotic process.

Suicidal/Homicidal:
Suicidal ideas or intentions are not in evidence and were not expressed by Eva today.
Eva convincingly denied homicidal ideas in today's session.

Stage of Change:
Precontemplation

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

HEALTH CONCERNS AND RISKS:

12 Units for H0038 Peer Support

Lawren Davenport, CPSW

Electronically Signed
Lawren Davenport, CPSW

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Medicaid ID: YIF915103969

Armendariz Barela, Eva

ID: 1000010729151 DOB: 6/19/1972

7/28/2023

11:08 AM

Case Management Note (SOS)

Present: Eva Barela, client and Silver Tabor, Case Manager

Location: SOS

Presenting Problem:

Anxiety is still experienced by Eva.

Eva continues to experience depression.

Eva continues to experience mood swings.

Symptoms of substance use continue to be described.

Poor interpersonal relationship skills

Client is impaired in the functional domain(s) of: independent living skills, housing, accessing medical care.

Case Management Services were today provided for Eva: completed documents needed to apply for NM ID.

Intervention: Case Manager guided Eva to complete the MVD paper work and explained the process of securing ID.

Completing this process is progress for Eva to start accessing medical care, applying for SSI and housing.

Eva appears flat, attentive, communicative, casually groomed, The patient convincingly denies suicidal ideas or intentions.

Assessment: Provided guidance in accessing resources and decreasing anxiety. Eva was receptive to independent living skills intervention.

Plan: Continue to provide support and education in order to increase stabilization in independent and community living.

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)

Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

2 units H2015 CCSS face to face with modifier HN-CQ

Time spent face to face with patient and/or family and coordination of care: 30 minutes.

Session start: 8:15 am

Session end: 8:45 am

Silver Tabor, BMSW, CSW

Electronically signed

By: Christina Wolford, LCSW

Service Location

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7/27/2023
6:43 PM

Medicaid ID: YIF915103969

Armendariz Barela, Eva
ID: 1000010729151 DOB: 6/19/1972

Case Management Note (SOS)

Service Location
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Presenting Problem:
Adjustment disorder.
Eva continues to experience anxiety.
Depressive symptoms continue.

Recent History:
Client has a history of chronic homelessness, substance abuse, anxiety, depression, PTSD, and impairment in the functional domains of independent living, working, and recreation.

Social Support Changes:
No changes in her family or social support network have occurred.

Intervention:
Prompted client to fulfill contractual obligations so that she may continue to stay overnight at the shelter.

Assessment:
Eva appears flat, minimally communicative, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood cannot be assessed. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Eva's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue prompting client to fulfill contractual obligations as needed and encourage client to participate in programming plans.

Diagnosis: Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

History of Risk Factors:
*History of Abuse:
Physical abuse
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present
Affect Flat or Blunted

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7/27/2023
6:43 PM

Armendariz Barela, Eva
ID: 1000010729151 DOB: 6/19/1972
Case Management Note (SOS)

History of Risk Factors:
*History of Abuse:
Physical abuse
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present:
Affect Flat or Blunted
*Rapid Shifts in Mood are Occurring

Suicide Risk Assessment:
Eva denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Eva's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Eva's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Eva. She denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 4:30 PM
Session end: 4:45 PM

T.Y.
Ryan Dingess, CSW
Electronically Signed
By: Ryan Dingess, CSW

Service Location

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Medicaid ID: YIF915103969

Armendariz Barela, Eva

7/27/2023 3:35 PM

ID: 1000010729151 DOB: 6/19/1972

Group Therapy Note (SOS)

Time spent face to face with patient and/or family and coordination of care: 180 min

Session start: 12:00 PM

Session end: 3:00 PM

Session Remarks:

Therapy Type:

Guided Imagery

Motivational Interviewing

Cognitive Behavioral Therapy

The intention of the group is to teach life skills and reduce symptoms of anxiety and depression.

Group Type:

Activity Therapy: Activity Therapy includes a variety of activities designed to help the group members learn more about themselves, problem solve, express feelings in appropriate ways, reduce stress and improve relationships with others. They may participate in art, music, exercise, sports, games and other activities.

Present Today:

Present at today's session were the following:

Fifteen members of the group were present today.

Group facilitated by Candice Owens, CCSS and co facilitated by Lawren Davenport, CPSW/CCSS.

Group Leader Interventions:

Therapist assigned a directed art or activity project toward a goal of improving reality testing.

Assigned worksheet/activity with topic of reality testing.

Encouraged exploration

Extrapolated to Life

Involved all Group

Encouraged Role Playing

Plan:

Continue Skill Development

Encourage increased participation.

Continue group.

Individual Remarks:

Appearance and Behavior:

In today's session Eva appeared flat, uncommunicative, and relaxed.

Participation:

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7/27/2023
3:35 PM

Medicaid ID: YIF915103969

Armendariz Barela, Eva

ID: 1000010729151 DOB: 6/19/1972

Group Therapy Note (SOS)

In today's session Eva appeared flat, uncommunicative, and relaxed.

Participation:
Eva was relatively inactive today and did not fully participate in discussions.

Verbal Content:
Eva spoke about problems arising from a low tolerance for frustration today, during the session.

Mental Status Exam:
Eva's mood is difficult to assess today. There were no signs of anxiety.
There are no signs of hallucinations, delusions, thought disorder or other signs of psychotic process.

Suicidal/Homicidal:
Suicidal ideas or intentions are not in evidence and were not expressed by Eva today.
Eva convincingly denied homicidal ideas in today's session.

Stage of Change:
Precontemplation

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

HEALTH CONCERNS AND RISKS:

12 Units for H0038 Peer Support

Lawren Davenport, CPSW

Electronically Signed
Dr. Lauren Davenport, CPSW

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7/26/2023
8:45 PM

Medicaid ID: YIF915103969

Armendariz Barela, Eva

ID: 1000010729151 DOB: 6/19/1972

Case Management Note (SOS)

Presenting Problem:
Symptoms of an adjustment disorder are present.
Eva continues to experience anxiety.
Symptoms of depression continue to be described.

Recent History:
Client has a history of chronic homelessness, substance abuse, anxiety, depression, PTSD, and impairment in the functional domains of independent living, working, and recreation.

Social Support Changes:
No changes in Eva's family or social support network have occurred.

Intervention:
Client was assisted with hygienic necessities so that she may maintain proper self care.

Assessment:
Eva presents as flat, minimally communicative, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood cannot be assessed. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Eva's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

Diagnosis: Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

History of Risk Factors:
*History of Abuse:
Physical abuse
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present
*Rapid Shifts in Mood are Occurring

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7/26/2023
8:45 PM

Armendariz Barela, Eva
ID: 1000010729151 DOB: 6/19/1972
Case Management Note (SOS)

Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

History of Risk Factors:
*History of Abuse:
Physical abuse
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present
*Rapid Shifts in Mood are Occurring

Suicide Risk Assessment:
She denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Eva's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Eva's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Eva. She denies having access to lethal means at this time.

1 Unit for H2015 Comprehensive Community Support Services - UH
Time spent face to face with patient and/or family and coordination of care: 15 min
Session start: 6:15 PM
Session end: 6:30 PM
T.Y
Ryan Dingess, CSW
Electronically Signed
By: Ryan Dingess, CSW

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Patient Account

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Therapy Groups

Eva Armendariz Barela

(6/19/1972) #1000010729151

Account ID# 13593477

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Demographics

Make Appoi

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Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options

☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the acctab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$758.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$758.68	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$758.68	Not A

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Add Late Fee

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		Chart Details	Howser, Dorothea
		Go to E-Prescribe	10000107
Demographics		Patient's Name	43 Yrs
		DOB 2/27/1980	Patient's ID
Anaphylactic Reaction Reported <input type="checkbox"/>		Patient Reviewed Demographics	
Patient Information		Insurance Information	
Other Contacts			
*Name (F,M,L,Suffix) Dorothea Howser		*Date of Birth 2/27/1980 Age: 43	
<input checked="" type="checkbox"/> Homeless Address		Unique Patient ID 1000010730077	
<input type="checkbox"/> Bad Address Addr 2 / Appt #		*Gender woman more	
<input type="checkbox"/> Sample County		Refer to patient as Dolly	
<input type="checkbox"/> Chart City, State, Zip		SSN # 111-11-1111	
Best Phone Home Phone Country US		Alt. Patient ID	
<input type="radio"/> Home Cell Phone		Room:	
<input type="radio"/> Work Work Phone ext		MAR <input type="checkbox"/> API	
<input type="radio"/> Cell Email			
Patient Status			
<input checked="" type="radio"/> Active			
<input type="radio"/> Inactive			
<input type="radio"/> Pending			
API <input type="checkbox"/>			
Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message			
Employment Status			
School or Employer			
Grade			
Marital Status			
Sexual Orientation			
*Ethnicity Not Hispanic or Latino			
Ethnicity 2 more			
Religion			
Annual Household Income			
Family Size			
Veteran <input type="radio"/> Y <input type="radio"/> N			
*Race White			
Race 2			
*Preferred Language			
Disability			
Release of Info			
Patient Calendar Note			
Adv. Dir.			
Miscellaneous Notes			
Custom Fields			
Date Of Current Illness Onset		Date Of Similar Illness	
Date of Current Admission: From		To	
Admitting DX			
Dates Unable To Work: From		To	
Condition Related To Employment? <input type="radio"/> Yes <input checked="" type="radio"/> No		State Of Accident	
Condition Related To Auto Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No			
Condition Related To Other Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No			
In treatment Previously? <input type="radio"/> Y <input type="radio"/> N If yes, where?			
Date Of Death		Preliminary Cause	

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Medicaid ID: YIF915012016

Howser, Dorothea

ID: 1000010730077 DOB: 2/27/1980

Case Management Note (SOS)

Use Note Creation Time
Clear Time
Set Date/Time

7/30/2023
5:09 AM

Service Location
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Audit Log

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Presenting Problem:
Symptoms of mood swings continue to be described.

Social Support Changes:
No changes in Dolly's family or social support network have occurred.

Recent History: Client is impaired in the functional domain(s) of:
Independent living
working
learning
recreation
Unemployment
clients mental illness makes functioning in most domains difficult
schizoaffective disorder
substance abuse is reported

THERAPEUTIC INTERVENTION: Client was de escalated as she became angry that another client bumped into her mat as she slept. Client was advised that she needs to be understanding that accidents will happen in group living. Client was advised to bring all matters to staff so that they may find resolve.

Service: Client was provided new linens and was given ibuprofen to help alleviate a headache.

Assessment: Dolly presents as irritable, Dolly presents as wary, minimally communicative, and tense. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood cannot be assessed. Affect is appropriate, full range, and congruent with mood. The patient convincingly denies suicidal ideas or intentions. Cognitive functioning and fund of knowledge are intact and age appropriate. Short- and long-term memory are intact, as is ability to abstract and do arithmetic calculations. This patient is fully oriented. Vocabulary and fund of knowledge indicate cognitive functioning in the borderline range. Insight into problems appears to be poor. Judgment appears to be poor. She is easily distracted. Dolly displayed defiant behavior during the examination.

Client was reminded that she needs to take care of her eye as she experienced swelling and

1 of 1

7/30/23, 5:35 PM

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061
575-956-6131
575-956-6947
Medicaid ID: YIF915012016

Howser, Dorothea
ID: 1000010730077 DOB: 2/27/1980

Case Management Note (SOS)
7/30/2023
5:09 AM

Use Note Creation Time
Clear Time
Set Date/Time

Client was reminded that she needs to take care of her eye as she experienced swelling and pain. Client was prompted to follow doctors recommendations.

Diagnosis: Schizoaffective disorder, bipolar type, F25.0 (ICD-10) (Active)

History of Risk Factors:

- *History of Alcohol or Substance Abuse
- *History of Violent Behavior: becomes combative when angered

Current Risk Factors:

- *Absent or Weak Support System:
- *Agitated or Very Angry:
- *Rapid Shifts in Mood are Occurring
- *Carries a Diagnosis of Schizophrenia

Suicide Risk Assessment:

Dolly denies suicidal plans or intentions.

Suicide Risk:

Based on the above risk factors, Dolly's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:

Based on the above risk factors, Dolly's risk of violence is considered Moderate. There are persistent aggressive ideas or actions, but no violence toward others has occurred or is planned.

Access to Lethal Means:

Access to lethal means was discussed with Dolly. She denies having access to lethal means at this time.

2 Units for H0038 Peer Support - UH, TV, HM

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 1:00 AM
Session end: 1:30 AM

Service Location

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SOS
610 N. Silver St
Silver City, NM 88061
575-958-6131
575-958-6947
Medicaid ID: YIF915012016

Howser, Dorothea
ID: 1000010730077 DOB: 2/27/1980
Case Management Note (SOS)

Use Note Creation Time
Clear Time
Set Date/Time
7/30/2023
5:09 AM

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Violent Behavior: becomes combative when angered

Current Risk Factors:
*Absent or Weak Support System:
*Agitated or Very Angry:
*Rapid Shifts in Mood are Occurring
*Carries a Diagnosis of Schizophrenia

Suicide Risk Assessment:
Dolly denies suicidal plans or intentions.

Suicide Risk:
Based on the above risk factors, Dolly's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:
Based on the above risk factors, Dolly's risk of violence is considered Moderate. There are persistent aggressive ideas or actions, but no violence toward others has occurred or is planned.

Access to Lethal Means:
Access to lethal means was discussed with Dolly. She denies having access to lethal means at this time.

2 Units for H0038 Peer Support - UH, TV, HM

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 1:00 AM
Session end: 1:30 AM

rcd

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location

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575-956-6131
575-956-6947

Use Note Creation Time
Clear Time
Set Date/Time
7/27/2023
12:34 AM

Medicaid ID: Y1F915012016

Howser, Dorothea

ID: 1000010730077 DOB: 2/27/1980
Case Management Note (SOS)

Presenting Problem:
Dolly continues to experience anxiety.

Mood swings continue.

Social Support Changes:
Dolly's family or social support network has occurred no changes.

Recent History: Client is impaired in the functional domain(s) of:
learning
working
Independent living
socializing

schizoaffective disorder

conduct disorder

Client's mental illness makes functioning difficult

Service: Client was given ibuprofen in an effort to alleviate pain she was experiencing from a headache. Client asked if lights could be turned out because they were hurting her eyes. Client was given an ice pack to help swelling go down due to an eye infection.

The patient was given emotional support.

Therapeutic efforts included improving limit setting and boundaries.

Client was instructed that she would need to exit a restroom as she was passed the allotted time allowed for hygiene per client.

Assessment: Client cried in agony as she described a headache that started near the base of her neck base of the skull. Client cannot find rest due to pain levels. She was advised to seek emergency help. She declines.

Client was prompted to reach out for medical services. Client will continued to be monitored and accommodated throughout night.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Service Location
Turn

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SOS

610 N. Silver St

Silver City, NM 88061

575-956-6131

575-956-6947

Medicaid ID: YIF915012016

Howser, Dorothea

ID: 1000010730077 DOB: 2/27/1980

Use Note Creation Time

Clear Time

Set Date/Time

7/27/2023

12:34 AM

Case Management Note (SOS)

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Schizoaffective disorder, bipolar type, F25.0 (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse

*History of Mental Illness:

Carries a Diagnosis of Schizophrenia

*History of Violent Behavior:

Current Risk Factors:

*Carries a Diagnosis of Schizophrenia

*Severe Insomnia is Present

*Absent or Weak Support System:

*Rapid Shifts in Mood are Occurring

Suicide Risk Assessment:

Actual suicidal plans are denied.

Suicide Risk:

Based on the above risk factors, Dolly's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:

Based on the above risk factors, Dolly's risk of violence is considered Low. Aggressive or violent impulses are intermittent or fleeting without plan or intent.

Access to Lethal Means:

Access to lethal means was discussed with Dolly. She denies having access to lethal means at this time.

2 Units for H0038 Peer Support - UH, HM

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 10:30 PM

Session end: 11:00 PM

rcd

Service Location

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SOS
610 N. Silver St
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575-956-6131
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Medicaid ID: YIF915012016

Howser, Dorothea
ID: 1000010730077 DOB: 2/27/1980

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/26/2023
2:30 AM

Presenting Problem:
insomnia
confusion

Social Support Changes:
Dolly's family or social support network has occurred no changes.

Recent History: Client is impaired in the functional domain(s) of:
Independent living
working
Recreation
These functional domains are impeded by mental illness which makes their fulfillment challenging.
schizoaffective disorder
conduct disorder
client's mental illness makes following established rules difficult.

THERAPEUTIC INTERVENTION: Client was asked to reposition herself to another sleeping area as she fell asleep in the common areas. It was recommended that she sleep in her designated area. Client became upset and was de escalated and the crisis was calmed. Client inquired as to why she would need to move. It was explained that established rules do not permit sleeping in the common areas unless a very specific set of circumstances occurs. Client was encouraged to ask staff about any concerns she may have in the future.

Assessment:
BEHAVIOR:
She has stopped taking prescribed medication. She is paying less attention to self care. Her ability to do domestic tasks is impaired and assistance is needed. She is socializing less with family and friends. There are no early signs of substance abuse problems. Some anger has been displayed. Impulsive behaviors are being displayed less frequently. Dolly has normal food and fluid intake.
Client was offered positive affirmation in regards to her following other established rules and the lessening of her fighting with staff.
Reflective statements were used to show that the client was actively being listened to.

Service Location

Audit Log

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575-958-6131
575-958-6947
Medicaid ID: YIF915012016

Howser, Dorothea
ID: 1000010730077 DOB: 2/27/1980
Case Management Note (SOS)

Use Note Creation Time
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Set Date/Time
7/26/2023
2:30 AM

Client was offered positive affirmation in regards to her following other established rules and the lessening of her fighting with staff.
Reflective statements were used to show that the client was actively being listened to.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Schizoaffective disorder, bipolar type, F25.0 (ICD-10) (Active)

History of Risk Factors:

- *History of Mental Illness:
Carries a Diagnosis of Schizophrenia
- *History of Alcohol or Substance Abuse
- *History of Violent Behavior:

Current Risk Factors:

- *Absent or Weak Support System:
- *Agitated or Very Angry:
- *Rapid Shifts in Mood are Occurring
- *Carries a Diagnosis of Schizophrenia

Suicide Risk Assessment:

Suicidal plans or intentions are denied by Dolly.

Suicide Risk:

Based on the above risk factors, Dolly's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:

Based on the above risk factors, Dolly's risk of violence is considered Low. Aggressive or violent impulses are intermittent or fleeting without plan or intent.

Access to Lethal Means:

Access to lethal means was discussed with Dolly.

2 Units for H0038 Peer Support - UH, HM

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 12:30 AM
Session end: 1:00 AM

Service Location

Audit Log

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SOS

610 N. Silver St

Silver City, NM 88061

575-956-6131

575-956-6947

Medicaid ID: YIF915012016

Howser, Dorothea

ID: 1000010730077 DOB: 2/27/1980

Case Management Note (SOS)

7/26/2023

2:30 AM

Use Note Creation Time

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Service Location

Turn

Audit Log

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Diagnosis: Schizoaffective disorder, bipolar type, F25.0 (ICD-10) (Active)

History of Risk Factors:

*History of Mental Illness:

Carries a Diagnosis of Schizophrenia

*History of Alcohol or Substance Abuse

*History of Violent Behavior:

Current Risk Factors:

*Absent or Weak Support System:

*Agitated or Very Angry:

*Rapid Shifts in Mood are Occurring

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2 Units for H0038 Peer Support - UH, HM

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 12:30 AM

Session end: 1:00 AM

rcd

Ryan Dingess, CSW

Electronically Signed

By: Ryan Dingess, CSW

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SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Medicaid ID: YIF915012016

Howser, Dorothea
ID: 1000010730077 DOB: 2/27/1980

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/24/2023
7:39 AM

Presenting Problem:
Dolly continues to experience mood swings. Conduct orders continue. Does not follow the rules of curfew.

History: Client has a history of homelessness, unemployment, and poverty. Client has a mental history of diagnosed Schizoaffective disorder, bipolar type.

Social Support Changes:
Dolly's family or social support network has occurred no changes.

Case Management Services as follows were provided today: Today Dorothea was asked if she would be sleeping inside since she was sitting out past curfew. She said she did not want to due to the lights apparently hurting her eyes. After trying to negotiate and assure her that it would be better inside, Dorothea continued to refuse, and decided to stay outside throughout the night.

Assessment: Dolly presents as calm, Dolly appears flat, happy, attentive, minimally communicative, casually groomed, normal weight, and relaxed. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood cannot be assessed. Affect is appropriate, full range, and congruent with mood. Associations are intact and logical. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. The patient convincingly denies suicidal ideas or intentions.

Plan: Continue assisting client with her daily needs and asking what staff could do to make her want to stay inside.

History of Risk Factors:
*History of Mental Illness:
History of Severe Anxiety or Panic Attacks
Carries a Diagnosis of Schizophrenia

Current Risk Factors:
No current suicidal or violence risk factors are present.

Suicide Risk Assessment:
She denies suicidal ideas or intentions.

Diagnosis: Schizoaffective disorder, bipolar type, F25.0 (ICD-10) (Active)

Service Location

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575-956-6947

Medicaid ID: YIF915012016

Howser, Dorothea

ID: 1000010730077 DOB: 2/27/1980

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7/24/2023

7:39 AM

Case Management Note (SOS)

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Plan: Continue assisting client with her daily needs and asking what staff could do to make her want to stay inside.

History of Risk Factors:

*History of Mental Illness:

History of Severe Anxiety or Panic Attacks

Carries a Diagnosis of Schizophrenia

Current Risk Factors:

No current suicidal or violence risk factors are present.

Suicide Risk Assessment:

She denies suicidal ideas or intentions.

Diagnosis: Schizoaffective disorder, bipolar type, F25.0 (ICD-10) (Active)

2 Units for H0038 Peer Support - UH, TV

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 12:15 AM

Session end: 12:45 AM

AB

Joy Leatherman, CPSW

Electronically Signed

Service Location

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Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Find

Dorothea Howser

(2/27/1980) #1000010730077

Account ID# 13594403

Additional Patient Information

Chart Face

Demographics

Make Appoi

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options

☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the acctab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$495.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$495.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$495.00	Not A

Account Detail

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Refresh All From Note

Add Late Fee

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Delete Entire

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Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Clinical Order Sheets

Treatment Due: 9/1/20

This is the Chart Face for: **Haley, Shelly**

ID: 1000010733986 DOB: 4/17/1975 48 Y

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Adjustment disorder with anxiety, F43.22 (ICD-10) (Active)

Delusional disorders, F22 (ICD-10) (Active)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

History of deception/theft

History of deception/theft

Chart Reminders

Add or Update Managed Care Authorizations

Supp.

ED Visit

Filter Notes >>

Show All

Showing 365 of 365 Notes

1) 7/30/23 RD Treatment Plan (SOS) SOS Compiled Note Work Areas

TREATMENT PLAN FOR SHELLEY HALEY

A treatment plan was created or reviewed today, 7/30/2023, for Shelly Haley.

Meeting Start: 10:35 AM - Meeting End: 10:45 AM

This was a 90 Day Treatment Plan.

Diagnosis:

2) 7/30/23 RD Treatment Plan (SOS) SOS Compiled Note Work Areas

TREATMENT PLAN FOR SHELLEY HALEY

A treatment plan was created or reviewed today, 7/30/2023, for Shelly Haley.

Meeting Start: 10:35 AM - Meeting End: 10:45 AM

This was a 90 Day Treatment Plan.

Diagnosis:

3) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:

Adjustment disorder along with delusional ideation's.

Ms. Haley continues to experience anxiety.

Ms. Haley continues to experience depression.

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Clinical Msg

Rx Called In

Med Pickup

*Reminders

Send a Message

Calendar

Appt History

\$ Account

Active

Inactive

Pending

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ICANotes Behavioral Health EHR		Continue	Photo
		Chart Details	Haley, Shelly Patient's Name
		Go to E-Prescribe	10000107 Patient's ID
Demographics		DOB 4/17/1975 48 Yrs	
Anaphylactic Reaction Reported <input type="checkbox"/>		Patient Reviewed Demographics	
Patient Information		Insurance Information	
*Name (F,M,L,Suffix) Shelly Haley		*Date of Birth 4/17/1975 Age: 48	
<input checked="" type="checkbox"/> Homeless Address		Unique Patient ID 1000010733986	
<input type="checkbox"/> Bad Address Addr 2 / Appt # County		*Gender woman *Sex: F	
<input type="checkbox"/> Sample Chart City, State, Zip Silver City NM		Refer to patient as Ms. Haley	
Best Phone Home Phone Country US		SSN # 568-35-1102	
<input type="radio"/> Home Cell Phone		Alt. Patient ID	
<input type="radio"/> Work Work Phone ext		Room:	
<input type="radio"/> Cell Email		MAR <input type="checkbox"/> API	
Patient Status <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		Other Names Previous Address	
API <input type="checkbox"/>		Patient's Condition	
Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message		Date Of Current Illness Onset Date Of Similar Illness	
Employment Status		Date of Current Admission: From To	
School or Employer		Admitting DX	
Grade		Dates Unable To Work: From To	
Marital Status		Condition Related To Employment? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Sexual Orientation		Condition Related To Auto Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	
*Ethnicity Unknown		Condition Related To Other Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Ethnicity 2		In treatment Previously? <input type="radio"/> Y <input type="radio"/> N If yes, where?	
Religion		Date Of Death Preliminary Cause	
Annual Household Income		Release of Info	
Family Size		Patient Calendar Note	
Veteran <input type="radio"/> Y <input type="radio"/> N		Adv. Dir.	
*Race Unknown		Miscellaneous Notes	
Race 2		Custom Fields	
*Preferred Language			
Disability			

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SOS

610 N. Silver St

Silver City, NM 88061

575-956-6131

575-956-6947

Haley, Shelly

ID: 1000010733986 DOB: 4/17/1975

Use Note Creation Time

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Set Date/Time

7/30/2023

10:50 PM

Treatment Plan (SOS)

TREATMENT PLAN FOR SHELLEY HALEY

A treatment plan was created or reviewed today, 7/30/2023, for Shelly Haley.
Meeting Start: 10:35 AM - Meeting End: 10:45 AM
This was a 90 Day Treatment Plan.

Diagnosis:

Adjustment disorder with anxiety, F43.22 (ICD-10) (Active)
Delusional disorders, F22 (ICD-10) (Active)
Major depressive disorder, recurrent, mild, F33.0 (ICD-10) (Active)

PROBLEM / NEEDS:

Problem / Need # 1: Stress Exposure

Problem / Need: STRESS EXPOSURE

PROBLEM: Housing/Living Environment Deficiency

Ms. Haley's housing/living environment deficiency is an active need that affects her recovery environment and requires intervention. It is primarily manifested by:
Poor Budgeting Skills: Details are as follows:
*Resulting in Periods of Homelessness

PROBLEM: Mental Health

Ms. Haley's mental health is an active need that affects her recovery environment and requires intervention. It is primarily manifested by:
Need for Medical Management due to:
*Non-compliance with follow through of medications

PROBLEM: Social Activity/Skills

Ms. Haley's social difficulties are an active need that affects her recovery environment and requires intervention. It is primarily manifested by:
Awkward In Social Situations and: Details as follows:
*Has No Friends

PROBLEM: Stress Exposure

Ms. Haley's stress exposure is an active need that affects her recovery environment and requires intervention. It is primarily manifested by:
Exposure to Abuse with:
*Danger to Life and Symptoms of Post Traumatic Stress Disorder

LONG TERM GOALS:

Ms. Haley will recover from stress of recent tragedy without symptoms of PTSD.
Make appointment for medication management
Completion Date: 7/31/2024

Service Location

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7/30/23, 5:41 PM



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SOS

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Haley, Shelly

ID: 1000010733986 DOB: 4/17/1975

Treatment Plan (SOS)

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*Danger to Life and Symptoms of Post Traumatic Stress Disorder

LONG TERM GOALS:

Ms. Haley will recover from stress of recent tragedy without symptoms of PTSD.

Make appointment for medication management

Completion Date: 7/31/2024

SHORT TERM GOAL(S) & INTERVENTIONS:

Short Term Goal / Objective:

Ms. Haley will learn and implement one social skill per week.

Frequency: daily per day Duration: 15 minutes Progress: Plans to start soon

Target Date: 7/29/2023

Intervention:

Counselor will teach social skills to Ms. Haley and support and encourage implementation of at least one learned social skill per week. Progress will be monitored.

Frequency: daily per day Duration: 15 minutes

Intervention:

Counselor will teach Ms. Haley how to respond to social cues and other's needs appropriately. Progress will be monitored.

Frequency: daily per day Duration: 15 minutes

Intervention:

Counselor will provide a structured setting to help Ms. Haley utilize pro-social behavior and practice social skills. Progress will be monitored.

Frequency: daily per day Duration: 15 minutes

STATUS:

The undersigned clinician met with the patient (and family, as appropriate) on the date above in a face to face meeting to work with him/her in developing this Treatment Plan. Fair progress in reaching set goals and resolving this problem seemed apparent today. Recommend continuing the current interventions and short term goals. It is felt that more time is needed for the interventions to work.

BARRIERS

Emotional problems interfere with treatment.

- Emotional problems will be dealt with via treatment plan.

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SOS

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Haley, Shelly

ID: 1000010733986 DOB: 4/17/1975

Treatment Plan (SOS)

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BARRIERS

Emotional problems interfere with treatment.

- Emotional problems will be dealt with via treatment plan.

STRENGTHS

Ms. Haley's strengths include:

Behavioral

- Has no history of violence

- Has no history of angry outbursts

Cognitive

- Can make needs known

Communicative

- When well, communicates in a satisfactory manner

Family

- Patient has ability to use family support

Motivation

- Motivation for treatment is good

Physical

- Good medical care

Relationship

- Appears to have healthy supportive relationships

Social

- Interacts well with others

Spiritual

- Has strong religious beliefs

Signature below indicates that this Treatment Plan has been reviewed and approved:

Date: _____ Clinician: _____ Title: _____

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Haley, Shelly

ID: 1000010733986 DOB: 4/17/1975

Treatment Plan (SOS)

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Cognitive

- Can make needs known

Communicative

- When well, communicates in a satisfactory manner

Family

- Patient has ability to use family support

Motivation

- Motivation for treatment is good

Physical

- Good medical care

Relationship

- Appears to have healthy supportive relationships

Social

- Interacts well with others

Spiritual

- Has strong religious beliefs

Signature below indicates that this Treatment Plan has been reviewed and approved:

Date: _____ Clinician: _____ Title: _____

Date: _____ Patient/Client: _____

Date: _____ Parent/Guardian: _____

Date: _____ Other: _____

A copy of this treatment plan was: _____ given to the patient/client/family OR _____ declined by the patient/client/family:

Date: _____ Clinician: _____ Title: _____

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By: _____

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575-956-6947
Haley, Shelly
ID: 1000010733986 DOB: 4/17/1975
Treatment Plan (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023
10:48 PM

TREATMENT PLAN FOR SHELLEY HALEY
A treatment plan was created or reviewed today, 7/30/2023, for Shelly Haley.
Meeting Start: 10:35 AM - Meeting End: 10:45 AM
This was a 90 Day Treatment Plan.

Diagnosis:
Adjustment disorder with anxiety, F43.22 (ICD-10) (Active)
Delusional disorders, F22 (ICD-10) (Active)
Major depressive disorder, recurrent, mild, F33.0 (ICD-10) (Active)

PROBLEM / NEEDS:
Problem / Need # 1: Stress Exposure

Problem / Need: STRESS EXPOSURE

PROBLEM: Housing/Living Environment Deficiency
Ms. Haley's housing/living environment deficiency is an active need that affects her recovery environment and requires intervention. It is primarily manifested by:
Poor Budgeting Skills: Details are as follows:
*Resulting in Periods of Homelessness
PROBLEM: Mental Health
Ms. Haley's mental health is an active need that affects her recovery environment and requires intervention. It is primarily manifested by:
Need for Medical Management due to:
*Non-compliance with follow through of medications

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Create Discharge Summary

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<p>Haley, Shelly</p> <p>ID: 1000010733986 DOB: 4/17/1975</p> <p>Treatment Plan (SOS)</p>	<p>7/30/2023</p> <p>10:48 PM</p>

Need for Medical Management due to:

*Non-compliance with follow through of medications

PROBLEM: Social Activity/Skills

Ms. Haley's social difficulties are an active need that affects her recovery environment and requires intervention. It is primarily manifested by:

Awkward In Social Situations and: Details as follows:

*Has No Friends

PROBLEM: Stress Exposure

Ms. Haley's stress exposure is an active need that affects her recovery environment and requires intervention. It is primarily manifested by:

Exposure to Abuse with:

*Danger to Life and Symptoms of Post Traumatic Stress Disorder

LONG TERM GOALS:

Ms. Haley will recover from stress of recent tragedy without symptoms of PTSD.

Make appointment for medication management

Completion Date: 7/31/2024

SHORT TERM GOAL(S) & INTERVENTIONS:

Short Term Goal / Objective:

Ms. Haley will learn and implement one social skill per week.

Frequency: daily per day Duration: 15 minutes Progress: Plans to start soon

Target Date: 7/29/2023

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Counselor will teach social skills to Ms. Haley and support and encourage implementation of at least one learned social skill per week. Progress will be monitored.

Frequency: daily per day Duration: 15 minutes

Intervention:

Counselor will teach Ms. Haley how to respond to social cues and other's needs appropriately. Progress will be monitored.

Frequency: daily per day Duration: 15 minutes

Intervention:

Counselor will provide a structured setting to help Ms. Haley utilize pro-social behavior and practice social skills. Progress will be monitored.

Frequency: daily per day Duration: 15 minutes

STATUS:

The undersigned clinician met with the patient (and family, as appropriate) on the date above in a face to face meeting to work with him/her in developing this Treatment Plan.

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SOS

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Haley, Shelly

ID: 1000010733986 DOB: 4/17/1975

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7/30/2023
10:48 PM

Treatment Plan (SOS)

STATUS:

The undersigned clinician met with the patient (and family, as appropriate) on the date above in a face to face meeting to work with him/her in developing this Treatment Plan. Fair progress in reaching set goals and resolving this problem seemed apparent today. Recommend continuing the current interventions and short term goals. It is felt that more time is needed for the interventions to work.

BARRIERS

Emotional problems interfere with treatment.

- Emotional problems will be dealt with via treatment plan.

STRENGTHS

Ms. Haley's strengths include:

Behavioral

- Has no history of violence
- Has no history of angry outbursts

Cognitive

- Can make needs known

Communicative

- When well, communicates in a satisfactory manner

Family

- Patient has ability to use family support

Motivation

- Motivation for treatment is good

Physical

- Good medical care

Relationship

- Appears to have healthy supportive relationships

Social

- Interacts well with others

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610 N. Silver St

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Haley, Shelly

ID: 1000010733986 DOB: 4/17/1975

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7/30/2023

2:45 PM

Case Management Note (SOS)

Presenting Problem:

Adjustment disorder along with delusional ideation's.

Ms. Haley continues to experience anxiety.

Ms. Haley continues to experience depression.

Recent History:

Client has a history of chronic homelessness, unemployment, substance abuse, anxiety, depression, delusions, and impairment in the functional domains of independent and community living, socializing and recreation.

Social Support Changes:

The following changes in her social support network or family have occurred: Client has been allowed to return to the shelter after absence for months.

Intervention:

Client was assisted with hygienic necessities so she may shower and maintain proper self care.

Assessment:

Ms. Haley appears friendly, minimally communicative, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Ms. Haley's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:

Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

Diagnosis: Adjustment disorder with anxiety, F43.22 (ICD-10) (Active)

Delusional disorders, F22 (ICD-10) (Active)

Major depressive disorder, recurrent, mild, F33.0 (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse

*History of Mental Illness:

Carries a Diagnosis of Manic Depressive Illness

History of Severe Anxiety or Panic Attacks

Current Risk Factors:

*Experiencing Severe Anxiety or Panic

*A Major Depression is Present

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Haley, Shelly

ID: 1000010733986 DOB: 4/17/1975

Case Management Note (SOS)

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2:45 PM

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Delusional disorders, F22 (ICD-10) (Active)

Major depressive disorder, recurrent, mild, F33.0 (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse

*History of Mental Illness:

Carries a Diagnosis of Manic Depressive Illness

History of Severe Anxiety or Panic Attacks

Current Risk Factors:

*Experiencing Severe Anxiety or Panic

*A Major Depression is Present

Suicide Risk Assessment:

She denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, Ms. Haley's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, Ms. Haley's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:

Access to lethal means was discussed with Ms. Haley. She denies having access to lethal means at this time.

1 Unit for H2015 Comprehensive Community Support Services - TV

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 2:30 PM

Session end: 2:45 PM

T.Y.

Ryan Dingess, CSW

Electronically Signed

By: Ryan Dingess, CSW

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SOS
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Peters, Eric

ID: 1000010738057 DOB: 3/21/1978
Case Management Note (SOS)

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7/30/2023

1:14 AM

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Presenting Problem:

Anxiety is still experienced by Eric.
Symptoms of depression continue to be described.
Client describes pain throughout his body.

Social Support Changes:

Eric's family or social support network has occurred no changes.

Recent History:

Client is impaired in the functional domain(s) of:
Recreation
working
Independent living

Client suffers from command hallucinations
adjustment disorder

Client shakes nervously and has difficulty maintaining eye contact.

THERAPEUTIC INTERVENTION:

Client was offered support and encouraged to vent his problems. Client described severe pain throughout his body that he attributes to the later stages of cancer. Client was implored to seek medical treatment. Client spoke of feeling a deep sadness because he feels that his family has abandoned him during one of the most difficult periods in his life. Client was provided food and he was given melatonin to help aid him in sleep. Client spoke at length about his love for geology and his former passion of rock collecting.

Service: Client was provided new bedding and was given hygiene products in the the promotion of self care.

Assessment: He appeared restless and fidgety, as evidenced by: His body language and posture suggested that depression was present.

Client was near incipient tears at certain points in the intervention. Client was anxious. Client is restless and fidgety. Client's affect is appropriate. Client is casual in dress.

BEHAVIOR:

He is paying less attention to self care. His ability to do domestic tasks is impaired and assistance is needed. His relationships with family and friends have ceased. His use of

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Peters, Eric

ID: 1000010738057 DOB: 3/21/1978

Case Management Note (SOS)

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7/30/2023
1:14 AM

Presenting Problem:
Anxiety is still experienced by Eric.
Symptoms of depression continue to be described.
Client describes pain throughout his body.

Social Support Changes:
Eric's family or social support network has occurred no changes.

Recent History:
Client is impaired in the functional domain(s) of:
Recreation
working
Independent living

Client suffers from command hallucinations
adjustment disorder

Client shakes nervously and has difficulty maintaining eye contact.

THERAPEUTIC INTERVENTION:
Client was offered support and encouraged to vent his problems. Client described severe pain throughout his body that he attributes to the later stages of cancer. Client was implored to seek medical treatment. Client spoke of feeling a deep sadness because he feels that his family has abandoned him during one of the most difficult periods in his life. Client was provided food and he was given melatonin to help aid him in sleep. Client spoke at length about his love for geology and his former passion of rock collecting.

Service: Client was provided new bedding and was given hygiene products in the the promotion of self care.

Assessment: He appeared restless and fidgety, as evidenced by: His body language and posture suggested that depression was present.
Client was near incipient tears at certain points in the intervention. Client was anxious. Client is restless and fidgety. Client's affect is appropriate. Client is casual in dress.

BEHAVIOR:
He is paying less attention to self care. His ability to do domestic tasks is impaired and assistance is needed. His relationships with family and friends have ceased. His use of

Service Location

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SOS
610 N. Silver St
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Peters, Eric

ID: 1000010738057 DOB: 3/21/1978

Case Management Note (SOS)

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7/30/2023
1:14 AM

BEHAVIOR:
He is paying less attention to self care. His ability to do domestic tasks is impaired and assistance is needed. His relationships with family and friends have ceased. His use of substances has not increased and is not excessive. No anger has been displayed. Impulsive behaviors are being displayed less frequently. Eric has diminished food and fluid intake.

Client was reminded that he was in a safe place and was implored to reach out to staff if any needs arose. Client was encouraged to visit with local doctors. Client was asked open ended questions to better understand his anxiety and its root cause.
Active listening was used to build a rapport with client.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Adjustment disorder, unspecified, F43.20 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Schizophrenia
*History of Violent Behavior: client is easily frightened at times and becomes defensive.

Protective Factors:
*History of Ability to Cope with Stress
*Cooperative and Willing to Accept Help

Suicide Risk Assessment:
Actual suicidal plans are denied.

Suicide Risk:
Based on the above risk factors, Eric's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:
Based on the above risk factors, Eric's risk of violence is considered Moderate. There are persistent aggressive ideas or actions, but no violence toward others has occurred or is planned.

Service Location

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Peters, Eric

ID: 1000010736057 DOB: 3/21/1976

Case Management Note (SOS)

Use Note Creation Time

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7/30/2023
1:14 AM

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Schizophrenia
*History of Violent Behavior: client is easily frightened at times and becomes defensive.

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Based on the above risk factors, Eric's risk of violence is considered Moderate. There are persistent aggressive ideas or actions, but no violence toward others has occurred or is planned.

Access to Lethal Means:
Access to lethal means was discussed with Eric. He denies having access to lethal means at this time.

2 Units for H0038 Peer Support - UH, HM, TV

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 10:00 PM
Session end: 10:30 PM

rcd

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location

Audit Log

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SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Peters, Eric

ID: 1000010738057 DOB: 3/21/1978

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/29/2023
12:00 AM

Presenting Problem:
Eric continues to experience anxiety.
Depressive symptoms continue.
Mood swings continue.

Recent history ;

Client has a history of reoccurring homelessness, unemployment, financial instability.
Struggles with anxiety, an adjustment disorder, with depressive moods, poverty.

Social Support Changes:
No changes in his family or social support network have occurred.

Therapeutic intervention ;

Client approached staff, asking if there were any sweets in the kitchen, or cookies he could have to snack on. Staff checked the kitchen for him, and found some sweet, mexican bread, but he denied this, stating his stomach was upset, and would not have been able to eat it. Staff apologized, and said they had a sweet snack in their bag, that they could give him if he would like. Eric responded well to this, thanking staff, accepting the snack.

Assessment ;

BEHAVIOR:
Compliance with medication is good. His self care skills are impaired and he needs assistance or cues. He needs assistance with domestic tasks. His relationships with family

Service Location: SOS

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Use Note Creation Time

Clear Time

Set Date/Time

Peters, Eric

7/29/2023 12:00 AM

ID: 1000010738057 DOB: 3/21/1978

Case Management Note (SOS)

BEHAVIOR:
Compliance with medication is good. His self care skills are impaired and he needs assistance or cues. He needs assistance with domestic tasks. His relationships with family and friends are reduced. His functioning at work is impaired. There are no early signs of substance abuse relapse and sobriety has been maintained. His school performance is marginal. No anger has been displayed. There have been fewer instances of impulsive behaviors. Eric has normal food and fluid intake. Eric is sometimes confused.

Eric presents as calm, Eric appears friendly, attentive, communicative, casually groomed, normal weight, but appears anxious. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. Suicidal ideas are convincingly denied.

Diagnosis ;

Adjustment disorder, unspecified, F43.20 (ICD-10) (Active)

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

History of Risk Factors:

- *History of Alcohol or Substance Abuse
- *History of Mental Illness:
 - Carries a Diagnosis of Manic Depressive Illness
 - History of Severe Anxiety or Panic Attacks
- *History of Self Injurious Behavior:

Current Risk Factors:

- *Absent or Weak Support System:
 - No Religious or Social Support in Place
- *Experiencing Severe Anxiety or Panic
- *Severe Financial Difficulty
- *Rapid Shifts in Mood are Occurring
- *Feelings of Hopelessness, Worthlessness, or Guilt are Present:
- *Severe Insomnia is Present

Protective Factors:

- *History of Ability to Cope with Stress
- *Cooperative and Willing to Accept Help
- *History of Good Tolerance for Frustration

Service Location

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Audit Log

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7/30/23, 5:55 PM

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SOS
610 N. Silver St
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575-956-6131
575-956-6947

Peters, Eric

ID: 1000010736057 DOB: 3/21/1976

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/29/2023
12:00 AM

No Religious or Social Support in Place
*Experiencing Severe Anxiety or Panic
*Severe Financial Difficulty
*Rapid Shifts in Mood are Occurring
*Feelings of Hopelessness, Worthlessness, or Guilt are Present
*Severe Insomnia is Present

Protective Factors:
*History of Ability to Cope with Stress
*Cooperative and Willing to Accept Help
*History of Good Tolerance for Frustration
*Feelings of Responsibility to Children, Family, or Loved Others
*Strong Social Support System

Suicide Risk Assessment:
Eric denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Eric's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Eric's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Eric. He denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 10:45 AM
Session end: 11:00 AM

a.n.p

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location

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Peters, Eric

ID: 1000010736057 DOB: 3/21/1976

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/28/2023
5:03 PM

Presenting Problem:
Adjustment disorder.
He continues to experience symptoms of anxiety.
Symptoms of depression continue to be described.
Symptoms of psychosis continue to be described.

Recent History:
Client has a history of chronic homelessness, unemployment, substance abuse, anxiety, depression, and psych hospitalizations.

Social Support Changes:
No changes in his family or social support network have occurred.

Intervention:
Prompted client to fulfill contractual obligations so that he may continue to stay overnight at the shelter.

Assessment:
Eric appears downcast, minimally communicative, His speech cannot be tested. Mood cannot be assessed. It is not possible to determine if underlying psychotic symptoms are present. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Eric's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue to prompt client to fulfill contractual obligations as needed and encourage client to

Audit Log

Service Location: SOS

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Make Referral

Create Clinical Summary

Create Discharge Summary

Go to Therapy Groups

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7/30/23, 5:56 PM

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5:03 PM

Peters, Eric

ID: 1000010738057 DOB: 3/21/1978
Case Management Note (SOS)

Service Location
Turn

Audit Log

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Plan:
Continue to prompt client to fulfill contractual obligations|as needed and encourage client to participate in programming plans.

Diagnosis: Adjustment disorder, unspecified, F43.20 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Multiple Psychiatric Hospitalizations

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*A Major Depression is Present
*Severe Financial Difficulty

Suicide Risk Assessment:
Eric denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Eric's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Eric's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Eric. He denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 4:15 PM
Session end: 4:30 PM

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610 N. Silver St
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575-958-6131
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Peters, Eric

ID: 1000010738057 DOB: 3/21/1978

Case Management Note (SOS)

Use Note Creation Time
Clear Time
Set Date/Time
7/27/2023
1:11 AM

Presenting Problem:
Eric continues to experience anxiety.
Depressive symptoms continue.
Eric continues to experience mood swings.
Conduct disorder symptoms continue.

Recent history ;

Client has a history of reoccurring homelessness, unemployment, substance and alcohol abuse, financial instability. Struggles with poverty, sheltered homelessness, paranoia, an adjustment disorder.

Social Support Changes:
No changes in Eric's family or social support network have occurred.

Therapeutic intervention ;

Client was approached by staff, inquiring if he would like to search for a change of clean clothes, and linens for his bed. Client agreed to this, stating he would appreciate that, and was soon prompted to shower afterwards, so that he may better practice hygienic care.

Assessment ;

BEHAVIOR:
Compliance with medication is good. His self care skills are impaired and he needs assistance or cues. He needs assistance with domestic tasks. He is socializing less with

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Create Discharge Summ

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7/30/23, 5:57 PM

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Use Note Creation Time
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7/27/2023
1:11 AM

Peters, Eric

ID: 1000010738057 DOB: 3/21/1978

Case Management Note (SOS)

BEHAVIOR:
Compliance with medication is good. His self care skills are impaired and he needs assistance or cues. He needs assistance with domestic tasks. He is socializing less with family and friends. His work performance is impaired. He has maintained sobriety. His academic and social performance in school is marginal. There have been some outbursts or expressions of anger. Impulsive behaviors are occurring, but less frequently. Eric has normal food and fluid intake. Eric is sometimes confused.

Eric presents as calm, Eric presents as friendly, attentive, minimally communicative, casually groomed, normal weight, and relaxed. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. The patient convincingly denies suicidal ideas or intentions.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis ;

Adjustment disorder, unspecified, F43.20 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Schizophrenia
*History of Violent Behavior:

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present

Suicide Risk Assessment:
Eric denies suicidal plans or intentions.

Suicide Risk:
Based on the above risk factors, Eric's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:

Service Location
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7/27/2023
1:11 AM

Peters, Eric

ID: 1000010738057 DOB: 3/21/1976

Case Management Note (SOS)

Diagnosis ,

Adjustment disorder, unspecified, F43.20 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Schizophrenia
*History of Violent Behavior:

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present:

Suicide Risk Assessment:
Eric denies suicidal plans or intentions.

Suicide Risk:
Based on the above risk factors, Eric's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:
Based on the above risk factors, Eric's risk of violence is considered Low. Aggressive or violent impulses are intermittent or fleeting without plan or intent.

Access to Lethal Means:
Access to lethal means was discussed with Eric. He denies having access to lethal means at this time.

2 Units for H0038 Peer Support - HM, UH

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 11:50 PM
Session end: 12:20 AM

a.n.p.

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

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Patient A

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Patient Account

Batch Statements


Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups


 Find

Eric Peters
(3/21/1976) #1000010736057
Account ID# 13600383

Chart Face

Demographics

Make Appoi

 Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$2,819.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$2,819.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$2,819.00	Not A

The option for default service charge responsibility has been moved to the group level settings and directories, in the ac tab.

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/29/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/28/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/27/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/26/2023 H0038 Peer Support Ryan Dingess, CSW	45.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$45.00	\$0.00
7/26/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/26/2023 H0038 Peer Support Candice Owens, CSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/22/2023 H0038 Peer Support Joy Leatherman, CPSW	45.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$45.00	\$0.00
7/22/2023 H0038 Peer Support Joy Leatherman, CPSW	45.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$45.00	\$0.00

Refresh All From Note

Add Late Fee

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PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Clinical Order Sheets

Treatment Due: 6/25/20

This is the Chart Face for: **Lopez, Henry** ID: 1000010738264 DOB: 8/20/1962 60 Y

Convert DSM to ICD10

Current Diagnosis (Axis I - V) [Enlarge](#)

Schizoaffective disorder, unspecified, F25.9 (ICD-10) (Active)

Major depressive disorder, recurrent

Active Problem/Need List

Current Medications [Print List](#) [Enlarge](#)

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

Chart Reminders

Supp.

ED Visit

Add or Update Managed Care Authorizations

Filter Notes >> Show All > Showing 332 of 332 Notes

1) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
Symptoms of depression continue to be described.
Mood swings continue as well as symptoms of a schizoaffective disorder.

2) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
Henry continues to experience anxiety.
Henry continues to experience mood swings.
Symptoms of depression continue to be described.

3) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
Henry continues to experience anxiety.
Henry continues to experience mood swings.

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Clinical Msg

Rx Called In

Med Pickup

*Reminders

Send a Message

Calendar

Appt History

\$ Account

☒ Active
☐ Inactive
☐ Pending

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ICANotes Behavioral Health EHR		Continue	Photo
		Chart Details	Lopez, Henry Patient's Name
		Go to E-Prescribe	10000107 Patient's ID
Demographics		DOB 8/20/1962	
Anaphylactic Reaction Reported <input type="checkbox"/>		Patient Reviewed Demographics	
Patient Information		Insurance Information	
*Name (F,M,L,Suffix) Henry Lopez		*Date of Birth 8/20/1962 Age: 60	
<input type="checkbox"/> Homeless Address		Unique Patient ID 1000010738264	
<input type="checkbox"/> Bad Address Addr 2 / Appt # County		*Gender man *Sex: M	
<input type="checkbox"/> Sample Chart City, State, Zip		Refer to patient as Henry	
Best Phone Home Phone Country US		SSN # 525-04-3455	
<input type="radio"/> Home Cell Phone		Alt. Patient ID	
<input type="radio"/> Work Work Phone ext		Room:	
<input type="radio"/> Cell Email		MAR <input type="checkbox"/> API	
Patient Status		Other Names	
<input checked="" type="radio"/> Active		Previous Address	
<input type="radio"/> Inactive			
<input type="radio"/> Pending			
API <input type="checkbox"/>		Patient's Condition	
Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message		Date Of Current Illness Onset Date Of Similar Illness	
Employment Status		Date of Current Admission: From To	
School or Employer		Admitting DX	
Grade		Dates Unable To Work: From To	
Marital Status		Condition Related To Employment? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Sexual Orientation		Condition Related To Auto Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	
*Ethnicity Hispanic or Latino		Condition Related To Other Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Ethnicity 2		State Of Accident	
Religion		In treatment Previously? <input type="radio"/> Y <input type="radio"/> N If yes, where?	
Annual Household Income		Date Of Death Preliminary Cause	
Family Size		Release of Info	
Veteran <input type="radio"/> Y <input type="radio"/> N		Adv. Dir.	
*Race White		Patient Calendar Note	
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*Preferred Language			
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Lopez, Henry

ID: 1000010738264 DOB: 8/20/1962
Case Management Note (SOS)

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7/30/2023
5:19 PM

Presenting Problem:

Symptoms of depression continue to be described.
Mood swings continue as well as symptoms of a schizoaffective disorder.

Recent History:

Client has a history of chronic homelessness, unemployment, substance abuse, major depression, paranoia, hallucinations, and a schizoaffective disorder.

Social Support Changes:

No changes in his family or social support network have occurred.

Intervention:

Client was assisted with accessing the laundry room so he may find clean clothes and maintain proper self care.

Assessment:

Henry presents as flat, minimally communicative, and slow to respond. His speech cannot be tested. Mood cannot be assessed. It is not possible to determine if underlying psychotic symptoms are present. There are no signs of anxiety. There are no signs of hyperactive or attentional difficulties. Henry's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:

Continue assisting client as needed and prompt client to participate in programming plans.

Diagnosis: Schizoaffective disorder, unspecified, F25.9 (ICD-10) (Active)

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7/30/23, 6:03 PM

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Lopez, Henry

ID: 1000010738264 DOB: 8/20/1962
Case Management Note (SOS)

Use Note Creation Time
Clear Time
Set Date/Time

7/30/2023
5:19 PM

Plan:
Continue assisting client as needed and prompt client to participate in programming plans.

Diagnosis: Schizoaffective disorder, unspecified, F25.9 (ICD-10) (Active)
Major depressive disorder, recurrent, unspecified, F33.9 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Schizophrenia

Current Risk Factors:
*A Major Depression is Present
*Carries a Diagnosis of Schizophrenia

Protective Factors:
*Cultural, Spiritual, or Moral Beliefs / Attitudes Against Suicide
*Cooperative and Willing to Accept Help
*Has Reasons for Living
*Religious Beliefs

Suicide Risk Assessment:
Henry denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Henry's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Henry's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Henry. He denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - TV

Time spent face to face with patient and/or family and coordination of care: 15 min

Service Location
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Show Notes in List

SOS

610 N. Silver St

Silver City, NM 88061

575-956-6131

575-956-6947

Lopez, Henry

ID: 1000010738264 DOB: 8/20/1962

Case Management Note (SOS)

Use Note Creation Time

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7/30/2023

5:19 PM

History of Mental Illness:

Carries a Diagnosis of Schizophrenia

Current Risk Factors:

*A Major Depression is Present

*Carries a Diagnosis of Schizophrenia

Protective Factors:

*Cultural, Spiritual, or Moral Beliefs / Attitudes Against Suicide

*Cooperative and Willing to Accept Help

*Has Reasons for Living

*Religious Beliefs

Suicide Risk Assessment:

Henry denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, Henry's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, Henry's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:

Access to lethal means was discussed with Henry. He denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - TV

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 3:30 PM

Session end: 3:45 PM

T.Y

Ryan Dingess, CSW

Electronically Signed

By: Ryan Dingess, CSW

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7/30/23, 6:04 PM

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+ New Note

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Lopez, Henry

ID: 1000010738264 DOB: 8/20/1962
Case Management Note (SOS)

Use Note Creation Time

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7/30/2023
1:08 PM

Presenting Problem:

Henry continues to experience anxiety.
Henry continues to experience mood swings.
Symptoms of depression continue to be described.

Recent History: Client has a history of chronic homelessness, unemployment, anxiety, depression, grief, hallucinations, substance, use, poverty.

Social Support Changes:

No changes in Henry's family or social support network have occurred.

Intervention:

Prompted client to help me set up the dayhab room. Assisted client with cleaning up the laundry room.

Assessment

Henry presents as flat, Henry presents as friendly, inattentive, minimally communicative, casually groomed, normal weight, and relaxed. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Affect is appropriate, full range, and congruent with mood.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Schizoaffective disorder, unspecified, F25.9 (ICD-10) (Active)
Major depressive disorder, recurrent, unspecified, F33.9 (ICD-10) (Active)

Audit Log

Service Location: SOS

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SOS
810 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Lopez, Henry

ID: 1000010738264 DOB: 8/20/1962
Case Management Note (SOS)

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Assessment

Henry presents as flat, Henry presents as friendly, inattentive, minimally communicative, casually groomed, normal weight, and relaxed. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Affect is appropriate, full range, and congruent with mood.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Schizoaffective disorder, unspecified, F25.9 (ICD-10) (Active)
Major depressive disorder, recurrent, unspecified, F33.9 (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse

Current Risk Factors:

*Experiencing Severe Anxiety or Panic
*Describes Command Hallucinations, details are as follows:
*A Major Depression is Present
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present:
Affect Flat or Blunted
*Impaired Impulse Control
*Severe Insomnia is Present
*Serious Current Medical Problems

Suicide Risk:

Based on the above risk factors, Henry's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

2 Units for H0038 Peer Support - HM, TV

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 9:30 AM
Session end: 10:00 AM

JW

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

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Lopez, Henry

ID: 1000010738264 DOB: 8/20/1962
Case Management Note (SOS)

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2:11 AM

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Presenting Problem:

Henry continues to experience anxiety.
Henry continues to experience mood swings.

Recent history ;

Client has a history of reoccurring homelessness, unemployment, financial instability, alcohol abuse. Struggles with extreme poverty, anxiety, depression, mood swings, schizoaffective disorder.

Social Support Changes:

Henry's family or social support network has occurred no changes.

Therapeutic intervention ;

Client was assisted in switching out mats and bedding, after he had wet himself/ While let into the laundry room to find a clean change of clothes, and allowed a shower, staff switched mats, cleaning the wetted mat down, then started a load to wash the soiled linens and clothes. Clean sheets and bedding were provided, and placed on his bunk.

Assessment ;

BEHAVIOR:

Compliance with medication is good. He needs assistance or cues for self care tasks. His domestic skills are intact. He is socializing less with family and friends. His work performance is normal. There are no early signs of substance abuse relapse and sobriety has been maintained. His school performance is normal. No anger has been displayed. Impulsive behaviors are occurring, but less frequently. Henry has normal food and fluid intake. Henry is almost always confused.

Henry presents as calm, inattentive, minimally communicative, casually groomed, normal weight, and relaxed. and slow to respond. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. The patient convincingly denies suicidal ideas or intentions.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis ;

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Lopez, Henry

ID: 1000010738264 DOB: 8/20/1962

Case Management Note (SOS)

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7/30/2023
2:11 AM

Diagnosis ;

Schizoaffective disorder, unspecified, F25.9 (ICD-10) (Active)
Major depressive disorder, recurrent, unspecified, F33.9 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
History of Severe Anxiety or Panic Attacks
Carries a Diagnosis of Manic Depressive Illness
Carries a Diagnosis of Schizophrenia

Current Risk Factors:
*Describes Command Hallucinations, details are as follows:
*Severe Insomnia is Present
*Rapid Shifts in Mood are Occurring
*Carries a Diagnosis of Schizophrenia

Protective Factors:
*History of Ability to Cope with Stress
*Cooperative and Willing to Accept Help
*History of Good Tolerance for Frustration
*Has Reasons for Living
*Feelings of Responsibility to Children, Family, or Loved Others
*Strong Social Support System

Suicide Risk Assessment:
Henry denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Henry's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Henry's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Henry. He denies having access to lethal means at this time.

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Lopez, Henry

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*Describes Command Hallucinations, details are as follows.
*Severe Insomnia is Present
*Rapid Shifts in Mood are Occurring
*Carries a Diagnosis of Schizophrenia

Protective Factors:
*History of Ability to Cope with Stress
*Cooperative and Willing to Accept Help
*History of Good Tolerance for Frustration
*Has Reasons for Living
*Feelings of Responsibility to Children, Family, or Loved Others
*Strong Social Support System

Suicide Risk Assessment:
Henry denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Henry's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Henry's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Henry. He denies having access to lethal means at this time.

2 Units for H0038 Peer Support - UH

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 1:10 PM
Session end: 1:40 PM

a.n.p

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

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Lopez, Henry

ID: 1000010738264 DOB: 8/20/1962

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Case Management Note (SOS)

Presenting Problem: incontinence
confusion

He continues to experience symptoms of anxiety.
Henry continues to experience mood swings.

Social Support Changes:
Henry's family or social support network has occurred no changes.

Recent History: Client is impaired in the functional domain(s) of:
Independent living
learning
working
recreation
socializing

schizoaffective disorder
major depressive disorder

client experiences audio visual hallucinations
incontinence is experienced

THERAPEUTIC INTERVENTION: Client was offered comfort and calming words as he awoke from bed believing that he had an appointment with daytime staff though it was late in the night. Client was offered support. Client was gently persuaded to return to bed. Client had limit setting provided when he attempted to go outside to smoke outside of regulation hours.

Service. Client had his area sanitized after he altered staff that he had experienced incontinence. Client was given new clothes and was provided with new bedding. Client was assisted with his laundry.

Assessment: Client was disheveled in his appearance and his speech was low in volume in combination with being mumbled. Client was confused as he spoke. Client had difficulty maintaining eye contact. Client appears as distracted. Client has had difficulty finding rest throughout the night.

BEHAVIOR:
Medication has been taken regularly. He is paying less attention to self care. His ability to do

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Lopez, Henry

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Case Management Note (SOS)

BEHAVIOR:

Medication has been taken regularly. He is paying less attention to self care. His ability to do domestic tasks is impaired and assistance is needed. His relationships with family and friends are reduced. There have been some outbursts or expressions of anger. Impulsive behaviors are occurring, but less frequently. Henry has normal food and fluid intake. Henry is almost always confused.

Client was explained to that normal office hours had already passed and the client seemed to absorb what was spoke to him.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Schizoaffective disorder, unspecified, F25.9 (ICD-10) (Active)

Major depressive disorder, recurrent, unspecified, F33.9 (ICD-10) (Active)

History of Risk Factors:

*History of Mental Illness:

Carries a Diagnosis of Schizophrenia

*History of Alcohol or Substance Abuse

Current Risk Factors:

*Absent or Weak Support System:

Is Single

No Religious or Social Support in Place

*Carries a Diagnosis of Schizophrenia

*Rapid Shifts in Mood are Occurring

*Severe Financial Difficulty

Suicide Risk Assessment:

Actual suicidal plans are denied.

Suicide Risk:

Based on the above risk factors, Henry's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:

Based on the above risk factors, Henry's risk of violence is considered Low. Aggressive or violent impulses are intermittent or fleeting without plan or intent.

Access to Lethal Means:

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<p>SOS 610 N. Silver St Silver City, NM 88061</p> <p>575-956-6131 575-956-6947</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Lopez, Henry </div> <p>ID: 1000010738264 DOB: 8/20/1962</p> <p>Case Management Note (SOS)</p>	<div style="border: 1px solid black; padding: 2px; display: inline-block; margin-bottom: 2px;">Use Note Creation Time</div> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-bottom: 2px;">Clear Time</div> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-bottom: 2px;">Set Date/Time</div> <p>7/30/2023</p> <p>2:03 AM</p>
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History of Risk Factors:

- *History of Mental Illness:
Carries a Diagnosis of Schizophrenia
- *History of Alcohol or Substance Abuse

Current Risk Factors:

- *Absent or Weak Support System:
Is Single
No Religious or Social Support in Place
- *Carries a Diagnosis of Schizophrenia
- *Rapid Shifts in Mood are Occurring
- *Severe Financial Difficulty

Suicide Risk Assessment:

Actual suicidal plans are denied.

Suicide Risk:

Based on the above risk factors, Henry's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:

Based on the above risk factors, Henry's risk of violence is considered Low. Aggressive or violent impulses are intermittent or fleeting without plan or intent.

Access to Lethal Means:

Access to lethal means was discussed with Henry. He denies having access to lethal means at this time.

3 Units for H0038 Peer Support - UH, HM, TV

Time spent face to face with patient and/or family and coordination of care: 45 min

Session start: 11:00 PM
Session end: 11:45 PM

rcd

Ryan Dingess, CSW

Electronically Signed

Service Location: Turn

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610 N. Silver St
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Lopez, Henry

ID: 1000010738264 DOB: 8/20/1962

Case Management Note (SOS)

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Presenting Problem:
Henry continues to experience depression.
Henry continues to experience mood swings as well as symptoms of a schizoaffective disorder.

Recent History:
Client has a history of chronic homelessness, unemployment, substance abuse, major depression, paranoia, hallucinations, and a schizoaffective disorder.

Social Support Changes:
No changes in Henry's family or social support network have occurred.

Intervention:
Client was assisted with his medication in order to help keep him stable.

Assessment:
Henry presents as flat, minimally communicative, and slow to respond. His speech cannot be tested. Mood cannot be assessed. It is not possible to determine if underlying psychotic symptoms are present. There are no signs of anxiety. There are no signs of hyperactive or attentional difficulties. Henry's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

Diagnosis: Schizoaffective disorder, unspecified, F25.9 (ICD-10) (Active)
Major depressive disorder, recurrent, unspecified, F33.9 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Schizophrenia

Current Risk Factors:
*A Major Depression is Present
*Carries a Diagnosis of Schizophrenia

Protective Factors:
*Cultural, Spiritual, or Moral Beliefs / Attitudes Against Suicide
*Cooperative and Willing to Accept Help
*Has Reasons for Living

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*History of mental illness.
Carries a Diagnosis of Schizophrenia

Current Risk Factors:
*A Major Depression is Present
*Carries a Diagnosis of Schizophrenia

Protective Factors:
*Cultural, Spiritual, or Moral Beliefs / Attitudes Against Suicide
*Cooperative and Willing to Accept Help
*Has Reasons for Living
*Religious Beliefs

Suicide Risk Assessment:
Henry denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Henry's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Henry's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Henry. He denies having access to lethal means at this time.

1 Unit for H2015 Comprehensive Community Support Services - TV, UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 8:00 PM
Session end: 8:15 PM

T.Y.

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

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Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Henry Lopez

(8/20/1962) #1000010738264

Account ID# 13602590

Find

Chart Face

Demographics

Make Appoi

Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options

☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$8,477.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$8,477.62	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$8,477.62	Not A

Account Detail

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	45.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$45.00	\$0.00
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/29/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/29/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/29/2023 H2015 Comprehensive Community Ryan Dingess, CSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/28/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/28/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00

Refresh All From Note

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Therapy Groups

Henry Lopez

(8/20/1962) #1000010738264

Account ID# 13602590

Chart Face

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Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options

☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$8,477.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$8,477.62	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$8,477.62	Not A

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/29/2023 H2015 Comprehensive Community Ryan Dingess, CSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/28/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/28/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/28/2023 H2015 Comprehensive Community Ryan Dingess, CSW	19.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$19.66	\$0.00
7/27/2023 H0038 Peer Support Ryan Dingess, CSW	45.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$45.00	\$0.00
7/27/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/27/2023 H2015 Comprehensive Community Ryan Dingess, CSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/27/2023 H2015 Comprehensive Community Ryan Dingess, CSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/26/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00

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Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Clinical Order Sheets

Treatment Due: 7/24/20

Delet Entire

This is the Chart Face for: **Sprague, David S** ID: 44 DOB: 7/13/1982 41 Y

Convert DSM to ICD10

Current Diagnosis (Axis I - V) [Enlarge](#)

Major depressive disorder, single episode, moderate, F32.1 (ICD-10) (Active)
Post-traumatic stress disorder, chronic, F43.12

Active Problem/Need List

Current Medications [Print List](#) [Enlarge](#)

Adverse Drug Reactions and Allergies/Intolerances: Active List

No Adverse Medication Reactions or Allergies/Intolerances on record

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

History of substance use

Chart Reminders

Supp.

ED Visit

Add or Update Managed Care Authorizations

Filter Notes >> Show All Showing 88 of 88 Notes

1) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
David continues to experience anxiety.
David continues to exhibit symptoms of a conduct disorder. Violation of rules is frequent.
Symptoms of depression continue to be described.

2) 7/29/23 LD Group Therapy Note (SOS) SOS Compiled Note Work Areas

Time spent face to face with patient and/or family and coordination of care: 180 min
Session start: 11:00 AM
Session end: 2:00 PM

3) 7/23/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
David continues to experience anxiety.

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Clinical Msg

Rx Called In

Med Pickup

*Reminders

Send a Message

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+ New Note

SOS
610 N. Silver St
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Medicaid ID: 3571193524

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Set Date/Time

7/30/2023
3:54 AM

Sprague, David S

ID: 44 DOB: 7/13/1982

Case Management Note (SOS)

Presenting Problem:
David continues to experience anxiety.
David continues to exhibit symptoms of a conduct disorder. Violation of rules is frequent.
Symptoms of depression continue to be described.
Mood swings continue.

Recent history ;

Client has a history of reoccurring homelessness, unemployment, substance and alcohol abuse, financial instability. Struggles with extreme poverty, anxiety, depression, post-traumatic stress disorder.

Social Support Changes:
No changes in his family or social support network have occurred.

Therapeutic intervention ;

Client vented his frustrations to staff, about recently being asked to remove himself from the premises, for a few days. Staff validated his emotions, but reminded him that it was important to follow the guidelines set in place, to be able to habilitate the shelter, with no problems.

Assessment ;

BEHAVIOR:
Compliance with medication is good. His self care skills are intact and unimpaired. His domestic skills are intact and unimpaired. His relationships with family and friends are

Service Location: SOS

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Audit Log

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Make Referral

Create Clinical Summa

Create Discharge Summ

Go to Therapy Groups

Change Note Title

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7/30/2023 3:54:19 AM

Electronically Sign
and Lock this Note

Signed Copies:
7/30/2023 3:54:19 AM Rya

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7/30/23, 6:11 PM

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Medicaid ID: 3571193524

Sprague, David S

ID: 44 DOB: 7/13/1982

7/30/2023

3:54 AM

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BEHAVIOR:

Compliance with medication is good. His self care skills are intact and unimpaired. His domestic skills are intact and unimpaired. His relationships with family and friends are normal. He is performing normally at work. There are early signs of substance abuse problems. His school performance is marginal. Some angry outbursts are occurring. Impulsive behaviors are being displayed less frequently. David has normal food and fluid intake. David has not been confused.

David appears irritable, glum, attentive, communicative, casually groomed, normal weight, and tense. and appears anxious. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Demeanor is glum. He appears downcast. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. Suicidal ideas are convincingly denied.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis ;

Major depressive disorder, single episode, moderate, F32.1 (ICD-10) (Active)
Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Extreme poverty, Z59.5 (ICD-10) (Active)
Homelessness unspecified, Z59.00 (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse

*History of Mental Illness:

Carries a Diagnosis of Manic Depressive Illness

History of Severe Anxiety or Panic Attacks

Current Risk Factors:

*Agitated or Very Angry:

*Experiencing Severe Anxiety or Panic

*A Major Depression is Present

*Severe Financial Difficulty

*Feelings of Hopelessness, Worthlessness, or Guilt are Present

*Rapid Shifts in Mood are Occurring

Protective Factors:

*History of Ability to Cope with Stress

*Cooperative and Willing to Accept Help

*History of Good Tolerance for Frustration

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7/30/2023
3:54 AM

Sprague, David S

ID: 44 DOB: 7/13/1982

Case Management Note (SOS)

*Experiencing Severe Anxiety or Panic

*A Major Depression is Present

*Severe Financial Difficulty

*Feelings of Hopelessness, Worthlessness, or Guilt are Present

*Rapid Shifts in Mood are Occurring

Protective Factors:

*History of Ability to Cope with Stress

*Cooperative and Willing to Accept Help

*History of Good Tolerance for Frustration

*Feelings of Responsibility to Children, Family, or Loved Others

*Strong Social Support System

Suicide Risk Assessment:

David denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, David's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, David's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:

Access to lethal means was discussed with David. He denies having access to lethal means at this time.

2 Units for H0038 Peer Support - UH

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 1:20 PM
Session end: 1:50 PM

a.n.p

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location

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Medicaid ID: 3571193524

Sprague, David S

ID: 44 DOB: 7/13/1982

7/29/2023

2:06 PM

Group Therapy Note (SOS)

Time spent face to face with patient and/or family and coordination of care: 180 min

Session start: 11:00 AM

Session end: 2:00 PM

Session Remarks:

Therapy Type:

Cognitive Behavioral Therapy

Thought Field Therapy

Motivational Interviewing

Today's group it started with a mood check in. Everyone discussed their current mood and how it was different or the same as yesterday. We reviewed goals from last week and discussed progress and next steps. We decided on an afternoon topic and divided the preparation of lunch and prepared it as a group. The afternoon session we explored how our thoughts and feelings influence our behaviors, choices, and outcomes. Group explored fears, hopes, and thinking patterns. Explored the five senses and how it can help reducer anxiety.

Group Type:

Focus Group: Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention.

Present Today:

Present at today's session were the following: 13 members.

Group Leader Interventions:

Encouraged exploration

Extrapolated to Life

Therapist provided support and structure

Plan:

Encourage Participation and Engagement

Continue Skill Development

Encourage increased participation.

Individual Remarks:

Appearance and Behavior:

In today's session David appeared friendly, wary, communicative, and anxious.

Participation:

David was active today and participated fully in discussions today. The group was positively impacted by the client because of their encouraging statements and felt accepted.

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7/29/2023
2:06 PM

Sprague, David S
ID: 44 DOB: 7/13/1982

Group Therapy Note (SOS)

Participation:
David was active today and participated fully in discussions today. The group was positively impacted by the client because of their encouraging statements and felt accepted.

Verbal Content:
David spoke about problems arising from a low tolerance for frustration today, during the session. Client was positively impacted by the group today because they felt safe to share and received positive feedback.

Mental Status Exam:
David's mood appears normal with no signs of depression or mood elevation today. David displayed signs of anxiety. Presented tense or worried. Fidgety, restless behavior was exhibited.
There are no signs of hallucinations, delusions, thought disorder or other signs of psychotic process.

Suicidal/Homicidal:
Suicidal ideas or intentions are not in evidence and were not expressed by David today. David convincingly denied homicidal ideas in today's session.

Stage of Change:
Preparation

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.
Major depressive disorder, single episode, moderate, F32.1 (ICD-10) (Active)
Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Extreme poverty, Z59.5 (ICD-10) (Active)
Homelessness unspecified, Z59.00 (ICD-10) (Active)

HEALTH CONCERNS AND RISKS:
History of substance use
12 Units for H0038 Peer Support

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Medicaid ID: 3571193524

Sprague, David S

ID: 44 DOB: 7/13/1982

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7/29/2023

2:06 PM

Group Therapy Note (SOS)

David spoke about problems arising from a low tolerance for frustration today, during the session. Client was positively impacted by the group today because they felt safe to share and received positive feedback.

Mental Status Exam:

David's mood appears normal with no signs of depression or mood elevation today. David displayed signs of anxiety. Presented tense or worried. Fidgety, restless behavior was exhibited.

There are no signs of hallucinations, delusions, thought disorder or other signs of psychotic process.

Suicidal/Homicidal:

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Stage of Change:

Preparation

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

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Homelessness unspecified, Z59.00 (ICD-10) (Active)

HEALTH CONCERNS AND RISKS:

History of substance use

12 Units for H0038 Peer Support

Lawren Davenport, CPSW

Electronically Signed

By Lawren Davenport, CPSW

Service Location

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575-958-6947

Medicaid ID: 3571193524

Sprague, David S

ID: 44 DOB: 7/13/1982

Case Management Note (SOS)

Use Note Creation Time

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7/23/2023
4:11 AM

Presenting Problem:
David continues to experience anxiety.

Social Support Changes:
No changes in his family or social support network have occurred.

Recent History: Client is impaired in the functional domain(s) of:
learning
working
Unemployment
client admits prior substance use
major depressive disorder
PTSD

THERAPEUTIC INTERVENTION: Client was actively listened to as he gave reason for a sudden departure from the shelter. Client was empathized with but was also reminded that reentry to the shelter would not be permitted until 6 a.m. Client was offered a jacket and offered a weather update. Client was giving guidance as to what he can do to better communicate with his partner.

Instructions were given regarding building self-esteem.
Client explained that he felt sadness because his financial situation doesn't allow him to provide the amenities of life that he wants for those that he loves.

Assessment: He was appropriate in behavior. David presents as calm, minimally communicative, casually groomed, and relaxed. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. Affect is appropriate, full range, and congruent with mood. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. No suicidal ideas or intentions are present today. Homicidal ideas or intentions are denied.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Service Location

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<p>SOS 610 N. Silver St Silver City, NM 88061</p> <p>575-956-8131 575-956-8947</p> <p>Medicaid ID: 3571193524</p>	<p>Sprague, David S</p> <p>ID: 44 DOB: 7/13/1982</p> <p>Case Management Note (SOS)</p>
-------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Major depressive disorder, single episode, moderate, F32.1 (ICD-10) (Active)
 Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
 Extreme poverty, Z59.5 (ICD-10) (Active)
 Homelessness unspecified, Z59.00 (ICD-10) (Active)

History of Risk Factors:

- *History of Alcohol or Substance Abuse
- *History of Mental Illness:
Carries a Diagnosis of Manic Depressive Illness

Current Risk Factors:

- *Absent or Weak Support System:
- *Experiencing Severe Anxiety or Panic
- *Severe Financial Difficulty
- *A Major Depression is Present

Suicide Risk Assessment:

David denies suicidal plans or intentions.

Suicide Risk:

Based on the above risk factors, David's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:

Based on the above risk factors, David's risk of violence is considered Low. Aggressive or violent impulses are intermittent or fleeting without plan or intent.

Access to Lethal Means:

Access to lethal means was discussed with David. He denies having access to lethal means at this time.

2 Units for H0038 Peer Support - UH, TV, HM

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 12:00 AM
 Session end: 12:30 AM

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Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

David S Sprague

(7/13/1982) #44

Account ID# 13607851

Additional Patient Information

Find

Chart Face

Demographics

Make Appoi

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options

☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$2,648.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$2,648.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$2,648.00	Not A

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/29/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/23/2023 H0038 Peer Support Joy Leatherman, CPSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/23/2023 H0038 Peer Support Joy Leatherman, CPSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/18/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/14/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/11/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/8/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/8/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00

Refresh All From Note

Add Late Fee

1 of 1

Sign Out Edit View Format Chat/Help		Patier	
ICANotes Behavioral Health EHR		Continue	Photo
Demographics		Chart Details	Sanders, Crystal 46
		Go to E-Prescribe	Patient's Name 45 Yrs Patient's ID
			DOB 1/22/1978
		Anaphylactic Reaction Reported <input type="checkbox"/>	Patient Reviewed Demographics
Patient Information		Insurance Information	Other Contacts
*Name (F,M,L,Suffix) Crystal Sanders		*Date of Birth 1/22/1978 Age: 45	*Date of Entry 4/20/2023
<input type="checkbox"/> Homeless Address 505 N Cooper st		Unique Patient ID 46	*Sex: F Red fields are
<input type="checkbox"/> Bad Address Addr 2 / Appt #		*Gender woman more	
<input type="checkbox"/> Sample City, State, Zip Silver City NM 88061		Refer to patient as Crystal	
<input type="checkbox"/> Chart Best Phone Home Phone Country US		SSN # 541-96-1006	Extra Privacy
<input type="radio"/> Home Cell Phone		Alt. Patient ID	Room: MAR API
<input type="radio"/> Work Work Phone ext		Other Names	
<input type="radio"/> Cell Email		Previous Address	
Patient Status		Patient's Condition	
<input checked="" type="radio"/> Active		Date Of Current Illness Onset Date Of Similar Illness	
<input type="radio"/> Inactive		Date of Current Admission: From To	
<input type="radio"/> Pending		Admitting DX	
API <input type="checkbox"/>		Dates Unable To Work: From To	
Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message		Condition Related To Employment? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Employment Status		Condition Related To Auto Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	
School or Employer		Condition Related To Other Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Grade		State Of Accident	
Marital Status		In treatment Previously? <input type="radio"/> Y <input type="radio"/> N If yes, where?	
Sexual Orientation		Date Of Death Preliminary Cause	
*Ethnicity Not Hispanic or Latino			
Ethnicity 2 more			
Religion			
Annual Household Income			
Family Size			
Veteran <input type="radio"/> Y <input type="radio"/> N			
*Race White			
Race 2			
*Preferred Language English			
Disability			
		Release of Info	
		Patient Calendar Note	
		Adv. Dir.	
		Miscellaneous Notes	
		Custom Fields	

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ICANotes
Behavioral Health EHR

Chart Room

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Show Notes in List

+ New Note

Finishe

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947
Sanders, Crystal
ID: 46 DOB: 1/22/1978
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023
12:32 PM

Presenting Problem:
Anxiety is still experienced by Crystal.
Symptoms of depression continue to be described.

Recent History: Client has a history of chronic homelessness, unemployment, anxiety, depression, grief, substance use, poverty.

Social Support Changes:
No changes in Crystal's family or social support network have occurred.

Intervention:
Prompted client to help staff clean dishes so that she may be able to keep herself busy. Discussed with client why she was feeling upset and a bit down.

Assessment:
Crystal presents as calm, Crystal presents as downcast, attentive, communicative, casually groomed, underweight, but slow to respond. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Affect is appropriate, full range, and congruent with mood.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Alcoholism and drug addiction in family, Z63.72 (ICD-10) (Active)

History of Risk Factors:

Audit Log

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Go to WORK Areas

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Calendar

Print Invoice

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Make Referral

Create Clinical Summa

Create Discharge Summ

Go to Therapy Groups

Change Note Title

This Note was eSigned
7/30/2023 12:33:21 PM

Electronically Sign
and Lock this Note

Signed Copies:
7/30/2023 12:33:21 PM Rya

1 of 1

7/30/23, 6:17 PM

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ICANotes
Behavioral Health EHR

Chart Room Chart Face Back

< prev next >

Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Sanders, Crystal

ID: 46 DOB: 1/22/1978

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023

12:32 PM

Audit Log

Service Location

Turn

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Intervention:

Prompted client to help staff clean dishes so that she may be able to keep herself busy. Discussed with client why she was feeling upset and a bit down.

Assessment:

Crystal presents as calm, Crystal presents as downcast, attentive, communicative, casually groomed, underweight, but slow to respond. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Affect is appropriate, full range, and congruent with mood.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Alcoholism and drug addiction in family, Z63.72 (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse

Current Risk Factors:

*Experiencing Severe Anxiety or Panic

*A Major Depression is Present

*Severe Financial Difficulty

*Feelings of Hopelessness, Worthlessness, or Guilt are Present

Affect Flat or Blunted

*Severe Insomnia is Present

Suicide Risk:

Based on the above risk factors, Crystal's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

2 Units for H0038 Peer Support - HM, TV

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 12:00 PM

Session end: 12:30 PM

Ryan Dingess, CSW

Electronically Signed

By: Ryan Dingess, CSW

Sign Out
Edit
View
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Reports
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Chart Room
Chart Face
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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Sanders, Crystal

ID: 46 DOB: 1/22/1978

Use Note Creation Time
Clear Time
Set Date/Time

7/30/2023
3:12 AM

Case Management Note (SOS)

Presenting Problem:
She continues to experience symptoms of anxiety.
Substance use symptoms continue.

Social Support Changes:
No changes in Crystal's family or social support network have occurred.

Recent History: Client is impaired in the functional domain(s) of:
Independent living
working
recreation

limited mobility

Substance use in combination with limited mobility make fulfilling the functional domains
challenging.

predisposition to alcohol and substance abuse

Client has experienced domestic abuse
Client shows symptoms of PTSD

THERAPEUTIC INTERVENTION: The patient was given emotional support.
Therapeutic efforts also included encouragement to ventilate feelings.
Client spoke of prior addictions to prescription opioids and of withdrawal from said
substances. Client spoke with staff about escaping domestic abuse. Client spoke of the PTSD
that she feels she suffers now from that abuse. Client spoke about her worry for her friends
who are in active addiction. Client spoke at length about her family.

Building self-esteem was today discussed. Positive affirmations were used to remind the
client of her strengths and positive attributes. Reflective statements were used to show the
client that they were actively listened to. Client was encouraged to remain focused on obtaining
sobriety.

Assessment: Client was positive in her attitude. Client was ambulatory though it was strained.
Client was casual in dress. Client was insightful and had fair judgment as she spoke. Her
volume was normal and rate and her affect and associations were intact.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt
client to continue participating in programming plans now being implemented by shelter staff.

Service Location
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Audit Log

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SOS

610 N. Silver St

Silver City, NM 88061

575-958-6131

575-958-6947

Sanders, Crystal

ID: 46 DOB: 1/22/1978

Use Note Creation Time

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7/30/2023

3:12 AM

Case Management Note (SOS)

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Alcoholism and drug addiction in family, Z63.72 (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse

*History of Abuse:

Physical abuse

Current Risk Factors:

*Absent or Weak Support System:

Is Single

Suicide Risk Assessment:

Actual suicidal plans are denied.

Suicide Risk:

Based on the above risk factors, Crystal's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:

Based on the above risk factors, Crystal's risk of violence is considered Low. Aggressive or violent impulses are intermittent or fleeting without plan or intent.

Access to Lethal Means:

Access to lethal means was discussed with Crystal. She denies having access to lethal means at this time.

3 Units for H0038 Peer Support - UH, HM, TV

Time spent face to face with patient and/or family and coordination of care: 45 min

Session start: 11:45 PM

Session end: 12:30 AM

rcd

Ryan Dingess, CSW

Service Location

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Audit Log

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Sanders, Crystal

ID: 46 DOB: 1/22/1978

Use Note Creation Time
Clear Time
Set Date/Time

7/30/2023
2:20 AM

Case Management Note (SOS)

Presenting Problem:
Anxiety is still experienced by Crystal.
Symptoms of depression continue to be described.
Symptoms of mood swings continue to be described.

Recent history ;

Client has a history of homelessness, unspecified, substance and alcohol abuse, financial instability. Struggles with substance abuse, anxiety, major depressive disorder, and poverty.

Social Support Changes:
No changes in her family or social support network have occurred.

Therapeutic intervention ;

Client was prompted to discuss what her plans were for taking a step forward, to leave the shelter. Inquiring her on what she wanted to do, where she wanted to go from here, as they folded linens for the shelter. Client spoke of wanting to find her own housing again, and to find a job that would hire her, without finding her to be a liability.

Assessment ;

BEHAVIOR:
Medication has been taken regularly. Her self care skills are intact. Her domestic skills are intact. She is socializing less with family and friends. She is performing normally at work. There are early signs of substance abuse problems. Her academic and social performance in school is marginal. No anger has been displayed. There have been fewer instances of impulsive behaviors. Crystal has normal food and fluid intake. Crystal has not been confused.

Crystal appears calm, friendly, attentive, communicative, well groomed, normal weight, and relaxed. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. The patient convincingly denies suicidal ideas or intentions.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis ;

Service Location
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SOS

610 N. Silver St

Silver City, NM 88061

575-956-6131

575-956-6947

Sanders, Crystal

ID: 46 DOB: 1/22/1978

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023

2:20 AM

Diagnosis ;

Alcoholism and drug addiction in family, Z63.72 (ICD-10) (Active)

History of Risk Factors:

*History of Abuse:

Sexual Abuse

Physical abuse

*History of Alcohol or Substance Abuse

*History of Mental Illness:

Carries a Diagnosis of Manic Depressive Illness

History of Severe Anxiety or Panic Attacks

*History of Self Injurious Behavior:

Has Cut Self

Has Burned Self

Current Risk Factors:

*Experiencing Severe Anxiety or Panic

*Carries a Bipolar Diagnosis

*A Major Depression is Present

*Severe Financial Difficulty

*Feelings of Hopelessness, Worthlessness, or Guilt are Present:

*Perceived Burden to Others

*Rapid Shifts in Mood are Occurring

Protective Factors:

*History of Ability to Cope with Stress

*Cooperative and Willing to Accept Help

*History of Good Tolerance for Frustration

*Has Reasons for Living

*Feelings of Responsibility to Children, Family, or Loved Others

*Strong Social Support System

Suicide Risk Assessment:

She denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, Crystal's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, Crystal's current risk of violence is considered

Service Location

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SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Sanders, Crystal

ID: 46 DOB: 1/22/1978

Case Management Note (SOS)

7/30/2023
2:20 AM

Use Note Creation Time

Clear Time

Set Date/Time

*Severe Financial Difficulty

*Feelings of Hopelessness, Worthlessness, or Guilt are Present

*Perceived Burden to Others

*Rapid Shifts in Mood are Occurring

Protective Factors:

*History of Ability to Cope with Stress

*Cooperative and Willing to Accept Help

*History of Good Tolerance for Frustration

*Has Reasons for Living

*Feelings of Responsibility to Children, Family, or Loved Others

*Strong Social Support System

Suicide Risk Assessment:

She denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, Crystal's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, Crystal's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:

Access to lethal means was discussed with Crystal. She denies having access to lethal means at this time.

2 Units for H0038 Peer Support - UH

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 11:40 AM

Session end: 12:10 PM

a.n.p

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location

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Audit Log

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7/30/23, 6:21 PM

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Patient Account Batch Statements Reports Auto Post Payments Manual Post Payments Online Post Payments Therapy Groups

Crystal Sanders
(1/22/1978) #46
Account ID# 13607858

Chart Face Demographics Make Appoi

Find

Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$5,765.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$5,765.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
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Account Detail

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	45.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$45.00	\$0.00
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/29/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/28/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/27/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/26/2023 H0038 Peer Support Ryan Dingess, CSW	45.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$45.00	\$0.00
7/26/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/26/2023 H0038 Peer Support Ryan Dingess, CSW	45.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$45.00	\$0.00

Refresh All From Note

Add Late Fee

Sign Out

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Format

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Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Crystal Sanders

(1/22/1978) #46

Account ID# 13607858

Find

Chart Face

Demographics

Make Appoi

Additional Patient Information

Account Activity

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☒ All Charges

☐ Charges with Balances

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Totals:	\$5,765.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$5,765.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$5,765.00	Not A

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/26/2023 H0038 Peer Support Silver Tabor, BMSW, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/26/2023 H0038 Peer Support Candice Owens, CSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/25/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/25/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/22/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/21/2023 H0038 Peer Support Joy Leatherman, CPSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/21/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/21/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/20/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00

Refresh All From Note

Add Late Fee

Sign Out Edit View Format Reports Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Crystal Sanders

(1/22/1978) #46

Account ID# 13607858

Find

Chart Face

Demographics

Make Appoi

Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options

All Charges

Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$5,765.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$5,765.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$5,765.00	Not A

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/20/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/18/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/17/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/15/2023 H0038 Peer Support Group Lawren Davenport, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/14/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/14/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/13/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/12/2023 H0038 Peer Support Group Lawren Davenport, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/11/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00

Refresh All From Note

Add Late Fee

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Find a Chart

Chart Room

Back To Report

Photo

Ther. Groups

Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Clinical Order Sheets

Treatment

Due: 9/21/20

Delet

Entire

This is the Chart Face for: **Radan, Robert** ID: 108 DOB: 4/29/1976 47 Y

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Diffuse traumatic brain injury with loss of consciousness status unknown, initial encounter, S06.2YAA (ICD-10) (Active)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:
Client is unable to recognize social cues and any mental health behavior he may have.

Chart Reminders

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 26 of 26 Notes

1) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
Client presents as stable. No psychiatric complaints are today expressed.

Recent History:

2) 7/29/23 LD Group Therapy Note (SOS) SOS Compiled Note Work Areas

Time spent face to face with patient and/or family and coordination of care: 180 min
Session start: 11:00 AM
Session end: 2:00 PM

3) 7/28/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
Robert continues to experience anxiety.
Symptoms of depression continue to be described.

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Clinical Msg

Rx Called In

Med Pickup

*Reminders

Send a Message

Calendar

Appt History

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Acti

Inac

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Supp.

ED Visit

Sign Out Edit View Format Chat/Help		Patier	
ICANotes Behavioral Health EHR		Continue	Photo
		Chart Details	Radan, Robert 108
		Go to E-Prescribe	Patient's Name 47 Yrs Patient's ID
Demographics		DOB 4/29/1976	
Anaphylactic Reaction Reported <input type="checkbox"/>		Patient Reviewed Demographics	
Patient Information		Insurance Information	
Other Contacts			
*Name (F,M,L,Suffix) Robert Radan		*Date of Birth 4/29/1976 Age: 47	
<input type="checkbox"/> Homeless Address 610 N Silver St		Unique Patient ID 108	
<input type="checkbox"/> Bad Address Addr 2 / Appt #		*Gender man more	
<input type="checkbox"/> Sample County		Refer to patient as Robert	
<input type="checkbox"/> Chart City, State, Zip Silver City NM 88061		SSN # 225-35-3196	
Best Phone Home Phone Country US		Alt. Patient ID D10673788	
<input type="radio"/> Home Cell Phone (928)220-1075		Room:	
<input type="radio"/> Work Work Phone ext		MAR <input type="checkbox"/> API	
<input type="radio"/> Cell Email zonaradan@gmail.com		Extra Privacy	
Patient Status			
<input checked="" type="radio"/> Active			
<input type="radio"/> Inactive			
<input type="radio"/> Pending			
API <input type="checkbox"/>			
Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message			
Employment Status			
School or Employer			
Grade			
Marital Status single			
Sexual Orientation			
*Ethnicity Caucasian			
Ethnicity 2 more			
Religion			
Annual Household Income			
Family Size			
Veteran <input type="radio"/> Y <input checked="" type="radio"/> N			
*Race White			
Race 2			
*Preferred Language			
Disability			
Birth Order			
Multiple Birth			
Release of Info			
Patient Calendar Note			
Adv. Dir.			
Miscellaneous Notes			
Custom Fields			
Date Of Current Illness Onset		Date Of Similar Illness	
Date of Current Admission: From		To	
Admitting DX			
Dates Unable To Work: From		To	
Condition Related To Employment? <input type="radio"/> Yes <input checked="" type="radio"/> No		State Of Accident	
Condition Related To Auto Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No			
Condition Related To Other Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No			
In treatment Previously? <input type="radio"/> Y <input type="radio"/> N If yes, where?			
Date Of Death		Preliminary Cause	

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Behavioral Health EHR

Chart Room

Chart Face

Back

<- prev

next ->

Show Notes in List

+ New Note

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Alt. Patient ID: D10673788

Use Note Creation Time
Clear Time
Set Date/Time

7/30/2023
4:31 PM

Radan, Robert

ID: 108 DOB: 4/29/1976

Case Management Note (SOS)

Presenting Problem:
Client presents as stable. No psychiatric complaints are today expressed.

Recent History:
Client has a history of reoccurring homelessness, unemployment, and substance abuse.
Client suffers from a traumatic brain injury.

Social Support Changes:
No changes in Robert's family or social support network have occurred.

Intervention:
Client was assisted with activating his Track Phone after he came to staff and asked for help with turning on his service, client was advised to call the phone company using the phone at the front desk. Mr. Radan was successful in contacting customer service and speaking with a representative so he could activate his phone.

Assessment:
Robert appears friendly, attentive, communicative, and appears happy. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. Affect is appropriate, full range, and congruent with mood. Insight into problems appears normal. Judgment appears intact. There are no signs of anxiety. There are no signs of hyperactive or attentional difficulties. Robert's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:

Audit Log

Copy contents of the text only into: clipboard internal message
Copy complete note into: clipboard internal message

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Go to WORK Areas

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Capture Signature
#1 Signed By:

Capture Signature
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Capture Signature
#3 Signed By:

Calendar

Print Invoice

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Make Referral

Create Clinical Summa

Create Discharge Summ

Go to Therapy Groups

Change Note Title

This Note was eSigned
7/30/2023 4:32:31 PM

Electronically Sign
and Lock this Note

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7/30/2023 4:32:31 PM Rya

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Edit
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Reports
Chat/Help




Chart Room
Chart Face
Back

< prev
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Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Use Note Creation Time
Clear Time
Set Date/Time

7/30/2023
4:31 PM

Alt. Patient ID: D10673788

Radan, Robert

ID: 108 DOB: 4/29/1976

Case Management Note (SOS)

or hyperactive or attentional difficulties. Robert's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:

Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

Diagnosis: Diffuse traumatic brain injury with loss of consciousness status unknown, initial encounter, S06.2XAA (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse

Suicide Risk Assessment:

He denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, Robert's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, Robert's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:

Access to lethal means was discussed with Robert. He denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - TV

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 3:15 PM
Session end: 3:30 PM

T.Y

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location
Turn

Audit Log

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#3 Signed By:

1 of 1

7/30/23, 6:26 PM

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ICANotes
Behavioral Health EHR

Chart Room Chart Face Back

<- prev next ->
Show Notes in List

+ New Note

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Alt. Patient ID: D10673788

Use Note Creation Time
Clear Time
Set Date/Time
7/29/2023
2:07 PM

Radan, Robert

ID: 108 DOB: 4/29/1976

Group Therapy Note (SOS)

Time spent face to face with patient and/or family and coordination of care: 180 min
Session start: 11:00 AM
Session end: 2:00 PM

Session Remarks:
Therapy Type:
Cognitive Behavioral Therapy
Thought Field Therapy
Motivational Interviewing

Today's group it started with a mood check in. Everyone discussed their current mood and how it was different or the same as yesterday. We reviewed goals from last week and discussed progress and next steps. We decided on an afternoon topic and divided the preparation of lunch and prepared it as a group. The afternoon session we explored how our thoughts and feelings influence our behaviors, choices, and outcomes. Group explored fears, hopes, and thinking patterns. Explored the five senses and how it can help reducer anxiety.

Group Type:
Focus Group: Focus groups are assigned specific topics or problem areas to discuss. The ways the group members react to each other is part of the focus of clinical attention.

Present Today:
Present at today's session were the following: 13 members.

Group Leader Interventions:

Audit Log

Service Location: SOS
Turn Name In Header ON or OFF off

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Copy complete note into: clipboard internal message

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Print Preview

Go to WORK Areas

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#2 Signed By:

Capture Signature
#3 Signed By:

Calendar
Print Invoice
\$ Account
Make Referral
Create Clinical Summa
Create Discharge Summ
Go to Therapy Group:
Change Note Title

This Note was eSigned
7/29/2023 2:07:18 PM

Electronically Sign
and Lock this Note

Signed Copies:
7/29/2023 2:07:18 PM Lav

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Chat/Help




Chart Room
Chart Face
Back

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next >

Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Alt. Patient ID: D10673788

Radan, Robert

ID: 108 DOB: 4/29/1976

Group Therapy Note (SOS)

Use Note Creation Time
Clear Time
Set Date/Time

7/29/2023
2:07 PM

Service Location
Turn

Audit Log

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Capture Signature
#3 Signed By:

Group Leader Interventions:
Encouraged exploration
Extrapolated to Life
Therapist provided support and structure |

Plan:
Encourage Participation and Engagement
Continue Skill Development
Encourage increased participation.

Individual Remarks:
Appearance and Behavior:
In today's session Robert appeared friendly, communicative, and happy.

Participation:
Robert was active today and participated fully in discussions today. The group was positively impacted by the client because of their encouraging statements and felt accepted.

Verbal Content:
Robert spoke of self defeating behavior today, during the session. Client was positively impacted by the group today because they felt safe to share and received positive feedback.

Mental Status Exam:
Robert's mood appears normal with no signs of depression or mood elevation today. There were no signs of anxiety.
There are no signs of hallucinations, delusions, thought disorder or other signs of psychotic process.

Suicidal/Homicidal:
Suicidal ideas or intentions are not in evidence and were not expressed by Robert today. Robert convincingly denied homicidal ideas in today's session.

Stage of Change:
Precontemplation

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Diffuse traumatic brain injury with loss of consciousness status unknown, initial encounter, S06.2XAA (ICD-10) (Active)

1 of 1

7/30/23, 6:27 PM

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Chart Room

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061
575-956-6131
575-956-6947

Alt. Patient ID: D10673788

Radan, Robert

ID: 108 DOB: 4/29/1976

Group Therapy Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/29/2023
2:07 PM

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Verbal Content:
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Diffuse traumatic brain injury with loss of consciousness status unknown, initial encounter, S06.2XAA (ICD-10) (Active)

HEALTH CONCERNS AND RISKS:
Client is unable to recognize social cues and any mental health behavior he may have.

12 Units for H0038 Peer Support

Lawren Davenport, CPSW

Electronically Signed
By: Lawren Davenport, CPSW

Service Location

Turn

Audit Log

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Patient Account

Batch Statements

Reports

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Online Post Payments

Therapy Groups

Robert Radan

(4/29/1976) #108

Account ID# 13609765

Find

Chart Face

Demographics

Make Appoi

Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options

☒ All Charges

☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$1,475.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$1,475.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$1,475.00	Not A

Account Detail

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/29/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/28/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/27/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/27/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/26/2023 H0038 Peer Support Candice Owens, CSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/21/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/20/2023 H2015 Comprehensive Community Joy Leatherman, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/18/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00

Refresh All From Note

Add Late Fee

Sign Out Edit View Format Reports Chat/Help

Patient Account

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Manual Post Payments

Online Post Payments

Therapy Groups

Robert Radan

(4/29/1976) #108

Account ID# 13609765

Find

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Demographics

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Additional Patient Information

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☒ All Charges

☐ Charges with Balances

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New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$1,475.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$1,475.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$1,475.00	Not A

Account Detail

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/18/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/18/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/15/2023 H0038 Peer Support Group Lawren Davenport, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/15/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/14/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/13/2023 H2015 Comprehensive Community Michelle Grayless, MSW,	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/11/2023 H0038 Peer Support Joy Leatherman, CPSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/7/2023 H2015 Comprehensive Community Michelle Grayless, MSW,	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/1/2023 H0038 Peer Support Group Lawren Davenport, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00

Refresh All From Note

Add Late Fee

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ICANotes Behavioral Health EHR		Continue	Photo
		Chart Details	Madrid, Bernie Patient's Name
		Go to E-Prescribe	119 Patient's ID
Demographics		55 Yrs DOB 3/29/1968	
Anaphylactic Reaction Reported <input type="checkbox"/>		Patient Reviewed Demographics	
Patient Information		Insurance Information	
Other Contacts			
*Name (F,M,L,Suffix) Bernie Madrid		*Date of Birth 3/29/1968 Age: 55	
<input checked="" type="checkbox"/> Homeless Address 610 N Silver St		Unique Patient ID 119	
<input type="checkbox"/> Bad Address Addr 2 / Appt # County		*Gender man *Sex: M	
<input type="checkbox"/> Sample Chart City, State, Zip Silver City, NM, 88061		Refer to patient as Bernie	
Best Phone Home Phone Country US		SSN # 525-21-4150	
<input type="radio"/> Home Cell Phone (575)654-4009		Alt. Patient ID	
<input type="radio"/> Work Work Phone ext		Room:	
<input type="radio"/> Cell Email		MAR <input type="checkbox"/> API	
Patient Status <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		Extra Privacy	
API <input type="checkbox"/>			
Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message			
Employment Status		Other Names	
School or Employer		Previous Address	
Grade			
Marital Status		Patient's Condition	
Sexual Orientation		Date Of Current Illness Onset Date Of Similar Illness	
*Ethnicity Hispanic or Latino		Date of Current Admission: From To	
Ethnicity 2		Admitting DX	
Religion		Dates Unable To Work: From To	
Annual Household Income		Condition Related To Employment? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Family Size		Condition Related To Auto Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Veteran <input type="radio"/> Y <input type="radio"/> N		Condition Related To Other Accident? <input type="radio"/> Yes <input checked="" type="radio"/> No	
*Race Declined to Specify		State Of Accident	
Race 2		In treatment Previously? <input type="radio"/> Y <input type="radio"/> N If yes, where?	
*Preferred Language Declined to Specify		Date Of Death Preliminary Cause	
Disability		Release of Info	
		Patient Calendar Note	
		Adv. Dir.	
		Miscellaneous Notes	
		Custom Fields	

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Show Notes in List

+ New Note

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947
Madrid, Bernie
ID: 119 DOB: 3/29/1968
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023
4:35 AM

Presenting Problem:
Anxiety is still experienced by Bernie.

Recent history ;

Client has a history of homelessness, unspecified, substance and alcohol abuse, financial instability. Struggles with extreme poverty, anxiety, depression, an adjustment disorder.

Social Support Changes:
Bernie's family or social support network has occurred no changes.

Therapeutic intervention ;

Client was assisted in getting a mat and bedding for the night, so that he may go to sleep.

Assessment ;

BEHAVIOR:
Good medication compliance is noted. His self care skills are intact. His domestic skills are intact. His relationships with family and friends are normal. He is performing normally at work. He has maintained sobriety. He is performing normally in school. There have been no outbursts or expressions of anger. There have been no reported instances of impulsive behaviors. Bernie has normal food and fluid intake. Bernie has not been confused.

Bernie presents as calm, Bernie presents as friendly, attentive, communicative, well groomed, normal weight, and relaxed. He exhibits speech that is normal in rate, volume, and

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Create Clinical Summary

Create Discharge Summary

Go to Therapy Groups

Change Note Title

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7/30/2023 4:35:54 AM

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7/30/2023 4:35:54 AM Rya

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7/30/23, 6:31 PM

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947
Madrid, Bernie
ID: 119 DOB: 3/29/1968
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023
4:35 AM

Bernie presents as calm, Bernie presents as friendly, attentive, communicative, well groomed, normal weight, and relaxed. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. No suicidal ideas or intentions are present today.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis ;

Other problems related to life management difficulty, Z73.89 (ICD-10) (Active)
Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

History of Risk Factors:

- *History of Abuse:
Physical abuse
- *History of Alcohol or Substance Abuse
- *History of Mental Illness:
Carries a Diagnosis of Manic Depressive Illness
History of Severe Anxiety or Panic Attacks

Current Risk Factors:

- *Absent or Weak Support System:
No Religious or Social Support in Place
- *Experiencing Severe Anxiety or Panic
- *A Major Depression is Present
- *Severe Financial Difficulty
- *Feelings of Hopelessness, Worthlessness, or Guilt are Present

Protective Factors:

- *History of Ability to Cope with Stress
- *Cooperative and Willing to Accept Help
- *History of Good Tolerance for Frustration
- *Has Reasons for Living
- *Feelings of Responsibility to Children, Family, or Loved Others
- *Strong Social Support System

Suicide Risk Assessment:
Bernie denies suicidal ideas or intentions.

Service Location

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SOS
610 N. Silver St
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575-958-6131
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Madrid, Bernie
ID: 119 DOB: 3/29/1968
Case Management Note (SOS)

Use Note Creation Time

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7/30/2023
4:35 AM

*Experiencing Severe Anxiety or Panic
*A Major Depression is Present
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present

Protective Factors:
*History of Ability to Cope with Stress
*Cooperative and Willing to Accept Help
*History of Good Tolerance for Frustration
*Has Reasons for Living
*Feelings of Responsibility to Children, Family, or Loved Others
*Strong Social Support System

Suicide Risk Assessment:
Bernie denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Bernie's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Bernie's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Bernie. He denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 11:00 AM
Session end: 11:15 AM

a.n.p

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

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Service Location

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SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947
Madrid, Bernie
ID: 119 DOB: 3/29/1968
Case Management Note (SOS)

Use Note Creation Time

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Set Date/Time

7/29/2023
6:07 PM

Presenting Problem:
Adjustment disorder.
Anxiety is still experienced by Bernie.

Recent History:
Client has a history of impairment in the functional domains of independent living and recreation.

Social Support Changes:
No changes in his family or social support network have occurred.

Intervention:
Client was assisted with hygienic necessities so that he may shower and maintain proper self care.

Assessment
Bernie presents as friendly, attentive, communicative, and appears happy. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. Affect is appropriate, full range, and congruent with mood. Insight into problems appears normal. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Bernie's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

Diagnosis: Other problems related to life management difficulty, Z73.89 (ICD-10) (Active)
Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Absent or Weak Support System:
*Severe Financial Difficulty

Suicide Risk Assessment:
He denies suicidal ideas or intentions.

Suicide Risk:

Service Location

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Madrid, Bernie
ID: 119 DOB: 3/29/1968
Case Management Note (SOS)

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7/29/2023
6:07 PM

Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

Diagnosis: Other problems related to life management difficulty, Z73.89 (ICD-10) (Active)
Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Absent or Weak Support System:
*Severe Financial Difficulty

Suicide Risk Assessment:
He denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Bernie's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Bernie's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Bernie. He denies having access to lethal means at this time.

1 Unit for H2015 Comprehensive Community Support Services - UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 4:45 PM
Session end: 5:00 PM

T.Y.

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location

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610 N. Silver St
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Madrid, Bernie

ID: 119 DOB: 3/29/1968
Case Management Note (SOS)

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7/27/2023

12:55 AM

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Presenting Problem:
Anxiety is still experienced by Bernie.

Recent history ;

Client has a history of unspecified homelessness, unemployment, financial instability, substance and alcohol abuse. Struggles with an adjustment disorder with anxiety and depressive like symptoms, life management difficulties, poverty.

Social Support Changes:
Bernie's family or social support network has occurred no changes.

Therapeutic intervention ;

Client inquired staff if he could get his mat out from the laundry room, for the night. Staff obliged, letting him into the laundry room, where he asked if it was okay for him to help start a load for rotations, and straighten up the laundry room. Staff confirmed this was okay, thanking the client for the help offered.

Assessment ;

BEHAVIOR:
Medication has been taken regularly. His self care skills are intact and unimpaired. His domestic skills are intact. His relationships with family and friends are normal. He is performing normally at work. There are no early signs of substance abuse relapse and sobriety has been maintained. He is performing normally in school. There have been some outbursts or expressions of anger. There have been no reported instances of impulsive behaviors. Bernie has normal food and fluid intake. Bernie has not been confused.

Bernie appears calm, friendly, attentive, communicative, well groomed, normal weight, and relaxed. He exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Mood presents as normal with no signs of either depression or mood elevation. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. Suicidal ideas are convincingly denied.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis ;

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SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Madrid, Bernie

ID: 119 DOB: 3/29/1968

Case Management Note (SOS)

Use Note Creation Time

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7/27/2023

12:55 AM

Audit Log

Service Location

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Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis ;

Other problems related to life management difficulty, Z73.89 (ICD-10) (Active)

Adjustment disorder with mixed anxiety and depressed mood, F43.23 (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse

*History of Mental Illness:

Carries a Diagnosis of Manic Depressive Illness

History of Severe Anxiety or Panic Attacks

Current Risk Factors:

*Absent or Weak Support System:

No Religious or Social Support in Place

*Severe Financial Difficulty

Protective Factors:

*History of Ability to Cope with Stress

*Cooperative and Willing to Accept Help

*History of Good Tolerance for Frustration

*Feelings of Responsibility to Children, Family, or Loved Others

*Strong Social Support System

Suicide Risk Assessment:

He denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, Bernie's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, Bernie's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:

Access to lethal means was discussed with Bernie. He denies having access to lethal means at this time.

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Silver City, NM 88061

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Madrid, Bernie

ID: 119 DOB: 3/29/1968
Case Management Note (SOS)

Use Note Creation Time

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7/27/2023
12:55 AM

Current Risk Factors:
*Absent or Weak Support System:
No Religious or Social Support in Place
*Severe Financial Difficulty

Protective Factors:
*History of Ability to Cope with Stress
*Cooperative and Willing to Accept Help
*History of Good Tolerance for Frustration
*Feelings of Responsibility to Children, Family, or Loved Others
*Strong Social Support System

Suicide Risk Assessment:
He denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Bernie's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Bernie's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Bernie. He denies having access to lethal means at this time.

2 Units for H0038 Peer Support - UH

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 10:45 AM
Session end: 11:15 AM

a.n.p

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location

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+ New Note

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947
Madrid, Bernie
ID: 119 DOB: 3/29/1968
Case Management Note (SOS)

Use Note Creation Time
Clear Time
Set Date/Time
7/14/2023
11:05 AM

Present: Bernie Madrid, client, and Silver Tabor, Case Manager
Location: SOS

Presenting Problem:
He continues to experience symptoms of anxiety.
Symptoms of conduct disorder continue to be described.
Psychotic symptoms continue. Crisis situation this date.

Case Management Services were today provided for Bernie, as follows: Crisis intervention due to extreme emotional dysregulation.

Intervention: Case Manager met with Bernie regarding his self report of threats on his life from other shelter residents because he had helped staff in cleaning appliances. Case Manager observed Bernie was not able to maintain eye contact, a coherent train of thought, extreme finger and hand movements and speech has rapid and slurred. Bernie made statements that other residents were talking about him and asked if Case Manager could hear the voices talking about "getting him" to harm and kill. Bernie stated Facebook posts about him encouraged harm to him and people in the shelter were giving him "dirty looks" and not having anything to do with him because he is a "brown nose". Bernie stated he would kill himself before he would be harmed by anyone else. Suicide questionnaire was used to determine risk, and Bernie said he would shoot himself, but did not have a gun or bullet, but could probably find one. Bernie repeated numerous times to Case Manager and later to Dr. Pat Rowan, PhD, that he "did not want to go on" and "wanted to end this". Bernie stated he had no reason to go on and aske Case Manager to tell his mom that he loved her.
Case Manager used de-escalation techniques to try to reassure Bernie that no one was

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Create Discharge Summ
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Madrid, Bernie

ID: 119 DOB: 3/29/1968

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7/14/2023

11:05 AM

Case Management Note (SOS)

on and ask Case Manager to tell him that he loved her.

Case Manager used de-escalation techniques to try to reassure Bernie that no one was intending to harm him and staff was there for him to protect him and keep him safe from others and himself. Case Manager encouraged Bernie to allow Case Manager to take him to the hospital for evaluation or to allow EMT's to transport him. Bernie declined stating "they would hurt him" and he feared police intervention as he has been physically assaulted by police on other occasion during arrests. Bernie continued making incoherent statements about his mother and people harming her. Case Manager continued reassuring Bernie he was safe and CM would protect him and worked with him to accept he needed help from a therapist and possibly inpatient. Bernie told Case Manager he did not want to hurt her, and Case Manager acknowledged she knew she would not be harmed.

Case Manager was able to redirect Bernie into going to HMS for crisis counseling by asking Bernie if he would take a ride with CM to meet her friend who could provide the help he needed.

Follow up: Bernie was transported to HMS for evaluation by Dr. Pat Rowan, PhD., who prepared documents for a treatment hold. Case Manager remained with Bernie for emotional support and he said he felt safe with CS with him. Dr. Rowan and CM reassured Bernie "we" all wanted to help him be safe and police or ambulance staff were there to help also. Bernie did not at any time attempt to leave the area, but did continue his statements of "not wanting to go on and wanting to end this" meaning his life. Bernie was redirected into accepting the idea of help and evaluation. He declined transport to the hospital, but did accept a ambulance transport.

Case Manager validated Bernie's feelings and reassured him he was acting in his best interest to be safe and get the care he needs, and he may return to SOS at any time for shelter. Case Manager debriefed this event with Director Christie Wolford and shelter manager, Karissa.

7 units H2011 CCSS crisis face to face with modifiers, HN, CQ, and U2.

Time spent face to face with patine and/or family and coordination of care: 80 minutes

Session start: 10:20 am

Session end: 11:40 am

Silver Tabor, BMSW, CSW

Electronically signed

By: Christina Wolford, LCSW

On: 7/15/23 11:02 am

Current Risk Factors:

Bernie exhibits the following suicidal or violence risk factors:

*Exhibits Psychotic Symptoms:

Paranoid Ideas are Described

Service Location

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11:05 AM

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On: 7/15/23 11:02 am

Paranoid Ideas are Described

Based on the above risk factors, Bernie's risk of suicide is considered High. Suicidal preoccupation with plan and possible intent is present. Supervision is recommended.

Based on the above risk factors, Bernie's risk of violence is considered Low. Aggressive or violent impulses are intermittent or fleeting without plan or intent.

By Silver Tober, BMOH, COWI

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Bernie Madrid
(3/29/1968) #119
Account ID# 13610083

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Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$834.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$834.09	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$834.09	Not A

Account Detail

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/29/2023 H2015 Comprehensive Community Ryan Dingess, CSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/27/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/26/2023 H0038 Peer Support Ryan Dingess, CSW	45.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$45.00	\$0.00
7/26/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/25/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/22/2023 H0038 Peer Support Joy Leatherman, CPSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/21/2023 H2015 Comprehensive Community Joy Leatherman, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/14/2023 H2011 CSW Crisis Intervention Silver Tabor, BMSW, CSW	228.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$228.83	\$0.00

Refresh All From Note

Add Late Fee

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

Sign Out Edit View Format Reports Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Find

Bernie Madrid
(3/29/1968) #119
Account ID# 13610083

Chart Face

Demographics

Make Appoi

Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$834.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$834.09	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$834.09	Not A

Account Detail

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/13/2023 H2015 Comprehensive Community Michelle Grayless, MSW,	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/11/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/10/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/9/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/8/2023 H0038 Peer Support Joy Leatherman, CPSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/8/2023 H0038 Peer Support Group Lawren Davenport, CPSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/7/2023 H2015 Comprehensive Community Michelle Grayless, MSW,	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/5/2023 H0038 Peer Support Group Lawren Davenport, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/2/2023 H0038 Peer Support Joy Leatherman, CPSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00

Refresh All From Note

Add Late Fee

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Chart Room

Back To Report

Photo

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PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Clinical Order Sheets

Treatment

Due: 1/20/20

Delet
Entire

This is the Chart Face for: Pence, Victoria

ID: 140

DOB: 11/23/1951

71 Y

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Limitation of activities due to disability, Z73.6 (ICD-10) (Active)

Enlarge

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

Chart Reminders

Supp.

ED Visit

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 11 of 11 Notes

1) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
She continues to experience symptoms of anxiety.
Victoria continues to experience depression.

2) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
Anxiety is still experienced by Victoria.
Depressive symptoms continue.

3) 7/27/23 LD Group Therapy Note (SOS) SOS Compiled Note Work Areas

Time spent face to face with patient and/or family and coordination of care: 180 min
Session start: 12:00 PM
Session end: 3:00 PM

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Clinical Msg

Rx Called In

Med Pickup

*Reminders

Send a Message

Calendar

Appt History

\$ Account

☒ Active

☐ Inactive

☐ Pending

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Show Notes in List

+ New Note

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Pence, Victoria

ID: 140 DOB: 11/23/1951
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023
6:27 PM

Presenting Problem:

She continues to experience symptoms of anxiety.
Victoria continues to experience depression.

Recent History:

Impairment in the functional domain of independent living.
Client is a former nurse.
Client has physical limitations due to disability.

Social Support Changes:

The following changes in Victoria's family or social support network have occurred: Client moved to Silver City to take care of a client but found the client to be abusive and an alcoholic which left her displaced.

Intervention:

Prompted client to fulfill contractual obligations so that she may continue to stay overnight at the shelter.

Assessment:

Victoria presents as friendly, attentive, communicative, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Insight into problems appears normal. Judgment appears intact. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Victoria's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Audit Log

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clipboard

internal message

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Print

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Go to WORK Areas

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Calendar

Print Invoice

\$ Account

Make Referral

Create Clinical Summary

Create Discharge Summary

Go to Therapy Groups

Change Note Title

This Note was eSigned
7/30/2023 6:27:17 PM

Electronically Sign
and Lock this Note

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7/30/2023 6:27:17 PM

Rya

1 of 1

7/30/23, 6:39 PM

SOS 610 N. Silver St Silver City, NM 88061 575-956-6131 575-956-6947 <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid black; text-align: center;">Pence, Victoria</div> ID: 140 DOB: 11/23/1951 Case Management Note (SOS)	<div style="background-color: #d3d3d3; padding: 2px; margin-bottom: 2px;">Use Note Creation Time</div> <div style="background-color: #d3d3d3; padding: 2px; margin-bottom: 2px;">Clear Time</div> <div style="background-color: #d3d3d3; padding: 2px; margin-bottom: 2px;">Set Date/Time</div> <div style="margin-top: 10px;"> 7/30/2023 6:27 PM </div>
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There are no signs or symptoms of hyperactive or attentional difficulties. Victoria's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue to prompt client to fulfill contractual obligations as needed and encourage client to participate in programming plans.

Diagnosis: Limitation of activities due to disability, Z73.6 (ICD-10) (Active)

History of Risk Factors:
 *History of Abuse:
Physical abuse

Current Risk Factors:
 *Absent or Weak Support System:
 *Experiencing Severe Anxiety or Panic
 *Feelings of Hopelessness, Worthlessness, or Guilt are Present
 *Serious Current Medical Problems

Suicide Risk Assessment:
She denies suicidal ideas or intentions.

Suicide Risk:
Based on the above risk factors, Victoria's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:
Based on the risk factors reviewed, Victoria's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Victoria. She denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - TV, UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 4:00 PM
Session end: 4:15 PM

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Chart Room

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Show Notes in List

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Pence, Victoria

ID: 140 DOB: 11/23/1951

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7/30/2023

6:27 PM

Case Management Note (SOS)

participate in programming plans.

Diagnosis: Limitation of activities due to disability, Z73.6 (ICD-10) (Active)

History of Risk Factors:

- *History of Abuse:
Physical abuse

Current Risk Factors:

- *Absent or Weak Support System:
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1 Unit for H0038 Peer Support - TV, UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 4:00 PM
Session end: 4:15 PM

T.Y

Ryan Dingess, CSW

Electronically Signed
Ryan Dingess, CSW

Service Location

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Audit Log

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7/30/23, 6:40 PM

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575-956-6947

Pence, Victoria

ID: 140 DOB: 11/23/1951

Case Management Note (SOS)

Use Note Creation Time

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Set Date/Time

7/30/2023

3:29 AM

Audit Log

Service Location

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Presenting Problem:

Anxiety is still experienced by Victoria.
Depressive symptoms continue.

Social Support Changes: Client moved to Silver City to take care of a client but found the client to be abusive and an alcoholic which left her displaced.

Recent History: Client is impaired in the functional domain(s) of:
Independent living

Client formerly worked as a nurse

Client has disability.

THERAPEUTIC INTERVENTION: Therapeutic efforts also included encouragement to ventilate feelings.

Client spoke of her life in the medical field. Client expressed anxiety being in a town where she feels she has no connection. Therapeutic efforts also included a discussion of ways to facilitate communication of feelings. The client expressed that her sadness makes it difficult to want to initiate or engage in conversations. Client was encouraged to attempt speaking with her peers if only for a few minutes each day as a way of lessening those feelings.

Client also inquired as to how she may be assigned a lock box. Client asked if shelter staff could somehow facilitate helping her get personal items out of storage.

Assessment: Victoria presents as friendly, communicative, well groomed, but appears anxious. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Signs of mild depression are present. Demeanor is glum. Affect is appropriate, full range, and congruent with mood. There are no apparent signs of hallucinations, delusions, bizarre behaviors, or other indicators of psychotic process. Associations are intact, thinking is logical, and thought content appears appropriate. Suicidal ideas are convincingly denied. Cognitive functioning and fund of knowledge are intact and age appropriate. Short- and long-term memory are intact, as is ability to abstract and do arithmetic calculations. This patient is fully oriented. Vocabulary and fund of knowledge indicate cognitive functioning in the normal range. Insight into problems appears normal. Judgment appears intact. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Victoria's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Client was encouraged to speak with staff if any problems arose. She stated that she felt her personal property was missing but that she could not prove who had taken it. She was reminded that she should bring all matters to staff so that they may be examined.

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575-956-6947

Pence, Victoria

ID: 140 DOB: 11/23/1951
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023
3:29 AM

Client was encouraged to speak with staff if any problems arose. She stated that she felt her personal property was missing but that she could not prove who had taken it. She was reminded that she should bring all matters to staff so that they may be examined.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Limitation of activities due to disability, Z73.6 (ICD-10) (Active)

History of Risk Factors:
*History of Abuse:
Physical abuse

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*Feelings of Hopelessness, Worthlessness, or Guilt are Present
*Serious Current Medical Problems

Suicide Risk Assessment:
Victoria denies suicidal plans or intentions.

Suicide Risk:
Based on the above risk factors, Victoria's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:
Based on the risk factors reviewed, Victoria's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Victoria. She denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - UH, TV, HM

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 12:30 AM

Service Location

Audit Log

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Pence, Victoria

ID: 140 DOB: 11/23/1951
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023

3:29 AM

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Physical abuse

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1 Unit for H0038 Peer Support - UH, TV, HM

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 12:30 AM
Session end: 12:45 AM

rcd

Ryan Dingess, CSW

Electronically Signed
Ryan Dingess, CSW

Service Location
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Audit Log
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+ New Note

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Pence, Victoria

ID: 140 DOB: 11/23/1951
Group Therapy Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/27/2023
3:36 PM

Time spent face to face with patient and/or family and coordination of care: 180 min
Session start: 12:00 PM
Session end: 3:00 PM

Session Remarks:
Therapy Type:
Guided Imagery
Motivational Interviewing
Cognitive Behavioral Therapy
The intention of the group is to teach life skills and reduce symptoms of anxiety and depression.

Group Type:
Activity Therapy: Activity Therapy includes a variety of activities designed to help the group members learn more about themselves, problem solve, express feelings in appropriate ways, reduce stress and improve relationships with others. They may participate in art, music, exercise, sports, games and other activities.
Present Today:
Present at today's session were the following:
Fifteen members of the group were present today.
Group facilitated by Candice Owens, CCSS and co facilitated by Lawren Davenport, CPSW/CCSS.
Group Leader Interventions:
Therapist assigned a directed art or activity project toward a goal of improving reality testing.

Service Location: SOS

Turn Name In Header ON or OFF off

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Make Referral

Create Clinical Summary

Create Discharge Summary

Go to Therapy Group:

Change Note Title

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7/27/2023 3:36:54 PM

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7/27/2023 3:36:54 PM Lav

1 of 1

7/30/23, 6:42 PM

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Show Notes in List

SOS

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Pence, Victoria

ID: 140 DOB: 11/23/1951

Group Therapy Note (SOS)

Use Note Creation Time

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7/27/2023

3:36 PM

Group Leader Interventions:

Therapist assigned a directed art or activity project toward a goal of improving reality testing.

Assigned worksheet/activity with topic of reality testing.

Encouraged exploration

Extrapolated to Life

Involved all Group

Encouraged Role Playing

Plan:

Continue Skill Development

Encourage increased participation.

Continue group.

Individual Remarks:

Appearance and Behavior:

In today's session Victoria appeared friendly, glum, moderately communicative, and anxious.

Participation:

Victoria's participation today, was normal, with responses to others and sharing of personal experiences and feelings. The group was positively impacted by the client because of their encouraging statements and felt accepted.

Verbal Content:

Victoria spoke of interpersonal problems today, during the session.

Mental Status Exam:

Victoria's mood appears normal with no signs of depression or mood elevation today. Victoria displayed signs of anxiety. Presented tense or worried. Fidgety, restless behavior was exhibited.

There are no signs of hallucinations, delusions, thought disorder or other signs of psychotic process.

Suicidal/Homicidal:

Suicidal ideas or intentions are not in evidence and were not expressed by Victoria today.

Victoria convincingly denied homicidal ideas in today's session.

Stage of Change:

Precontemplation

Service Location

Audit Log

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575-956-6947

Pence, Victoria

ID: 140 DOB: 11/23/1951
Group Therapy Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/27/2023

3:36 PM

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Verbal Content:
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Mental Status Exam:
Victoria's mood appears normal with no signs of depression or mood elevation today. Victoria displayed signs of anxiety. Presented tense or worried. Fidgety, restless behavior was exhibited.
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Suicidal/Homicidal:
Suicidal ideas or intentions are not in evidence and were not expressed by Victoria today.
Victoria convincingly denied homicidal ideas in today's session.

Stage of Change:
Precontemplation

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Limitation of activities due to disability, Z73.6 (ICD-10) (Active)

HEALTH CONCERNS AND RISKS:

12 Units for H0038 Peer Support

Lawren Davenport, CPSW

Electronically Signed
Lawren Davenport, CPSW

Service Location: Turner

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Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Find

Victoria Pence
(11/23/1951) #140
Account ID# 13610778

Chart Face

Demographics

Make Appoi

Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$750.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$750.00	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$750.00	Not A

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/27/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/26/2023 H0038 Peer Support Candice Owens, CSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/22/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00
7/21/2023 H0038 Peer Support Lawren Davenport, CPSW	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$180.00	\$0.00

Refresh All From Note

Add Late Fee

ICANotes Behavioral Health EHR

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Find a Chart

Chart Room

Back To Report

Photo

Ther. Groups

Kardex

PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Clinical Order Sheets

Treatment

Due: 10/27/21

Delet Entire

Attson, Stephanie

This is the Chart Face for: **Attson, Stephanie**

ID: 151

DOB: 8/18/1987

35 Y

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Enlarge

Filter Notes >>

Show All

Showing 10 of 10 Notes

1) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem: leg pain
homelessness
Anxiety is still experienced by Stephanie.
Depressive symptoms continue.

2) 7/29/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
Stephanie continues to experience anxiety.
Symptoms of depression continue to be described.
Symptoms of mood swings continue to be described.

3) 7/29/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
She continues to experience symptoms of anxiety.
Stephanie continues to experience depression.
Symptoms of mood swings continue to be described.

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

Chart Reminders

Supp.

ED Visit

Add or Update Managed Care Authorizations

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Clinical Msg

Rx Called In

Med Pickup

*Reminders

Send a Message

Calendar

Appt History

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Acti

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Behavioral Health EHR

Continue

Photo

Chart Details

Attson
Patient

Demographics

Go to E-Prescribe

Anaphylactic Reaction Reported ☐

Patient Information		Insurance Information	
*Name (F,M,L,Suffix)	Stephanie Attson	*Date of Birth	8/18/1987
<input checked="" type="checkbox"/> Homeless	Address	Unique Patient ID	151
<input type="checkbox"/> Bad Address	Addr 2 / Appt #	*Gender	woman
<input type="checkbox"/> Sample	County	Refer to patient as	Stephanie
<input type="checkbox"/> Chart	City, State, Zip	SSN #	525-65-7572
Best Phone	Home Phone	Country	US
<input type="radio"/> Home	Cell Phone	Other Names	
<input type="radio"/> Work	Work Phone	Previous Address	
<input type="radio"/> Cell	Email	Alt. Patient ID	
Email 2			
Portal <input type="checkbox"/>			
API <input type="checkbox"/>			
Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message			
Employment Status		Date Of Current Illness Onset	
School or Employer		Date of Current Admission: From	
Grade		Dates Unable To Work: From	
Marital Status		Condition Related To Employment?	
Sexual Orientation		Condition Related To Auto Accident?	
*Ethnicity		Condition Related To Other Accident?	
Ethnicity 2		In treatment Previously? <input type="radio"/> Y <input type="radio"/> N If yes, whe	
Religion		Date Of Death Preliminary Car	
Annual Household Income		Release of Info	
Family Size		Patient Calendar Note	
Veteran <input type="radio"/> Y <input type="radio"/> N		Miscella	
*Race			
Race 2			
*Preferred Language			
Disability			
Native American <input type="radio"/> Y <input type="radio"/> N Tribal Affiliation			

Assigned Providers
are allowed to sign
Notes for this Patient

Karissa Andazola, CSW Role X Principal

< Select a Clinician >

< Multiple Clinicians >

Assign Provider(s)

Where Seen

Prime SOS

Add New Location

Med Rec

Red fields are required Blue fields are optional but add info to clinical note.

* = Required for Meaningful Use ✓ = Patient Has Accessed Portal

Show Fields used by elec

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Behavioral Health EHR

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Show Notes in List

+ New Note

Finishe

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947
Attson, Stephanie
ID: 151 DOB: 8/18/1987
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023
5:26 AM

Presenting Problem: leg pain
homelessness
Anxiety is still experienced by Stephanie.
Depressive symptoms continue.

Social Support Changes:
Stephanie's family or social support network has occurred no changes.

Recent History: Client is impaired in the functional domain(s) of:

working
learning
Independent living

client is a self described poly addict
Client was assaulted while living on the streets in ABQ

Client has torn ligaments in left leg.

THERAPEUTIC INTERVENTION: The patient was given emotional support.
Encouragement to ventilate feelings was also given to the patient.
Client was given asprin to help alleviate a throbbing pain located behind the knee cap through the calf muscle.

Service Location: SOS

Turn Name In Header ON or OFF off

Audit Log

Copy contents of the text only into: clipboard internal message

Copy complete note into: clipboard internal message

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Go to WORK Areas

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Capture Signature

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Calendar

Print Invoice

\$ Account

Make Referral

Create Clinical Summa

Create Discharge Summ

Go to Therapy Groups

Change Note Title

This Note was eSigned
7/30/2023 5:26:51 AM

Electronically Sign and Lock this Note

Signed Copies:
7/30/2023 5:26:51 AM Rya

1 of 1

7/30/23, 6:48 PM

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Show Notes in List

SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Attson, Stephanie

ID: 151 DOB: 8/18/1987
Case Management Note (SOS)

Use Note Creation Time
Clear Time
Set Date/Time

7/30/2023
5:26 AM

Service Location
Turn

Audit Log

Copy contents of the text only into
Copy complete note into

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Client was given aspirin to help alleviate a throbbing pain located behind the knee cap through the calf muscle.

Client was assisted in moving from a communal couch to a table so that she could elevate her foot on a chair. Client was asked if she would like medical treatment but declined. Client was encouraged to alert staff if she found herself in need of assistance.

Assessment: She was restless and fidgety. Client was in pain as it could be seen in her facial expressions. Client moaned in agony for increments of ten seconds or more and then would fall back into silence. Client was casual in her dress. Her words were spoken in a low volume and her sentences were fragmented due to pain levels.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

History of Risk Factors:

- *History of Abuse:
Physical abuse
- *History of Alcohol or Substance Abuse

Current Risk Factors:

- *Absent or Weak Support System:
- *Severe Financial Difficulty
- *Serious Current Medical Problems injured leg and ankle
- *Perceived Burden to Others

Suicide Risk Assessment:

Actual suicidal plans are denied.

Suicide Risk:

Based on the above risk factors, Stephanie's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:

Based on the above risk factors, Stephanie's risk of violence is considered Low. Aggressive or violent impulses are intermittent or fleeting without plan or intent.

Access to Lethal Means:

Access to lethal means was discussed with Stephanie. She denies having access to lethal means at this time.

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SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Attson, Stephanie

ID: 151 DOB: 8/18/1987

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023
5:26 AM

Client to continue participating in programming plans now being implemented by shelter staff.

History of Risk Factors:

- *History of Abuse:
 - Physical abuse
- *History of Alcohol or Substance Abuse

Current Risk Factors:

- *Absent or Weak Support System:
- *Severe Financial Difficulty
- *Serious Current Medical Problems injured leg and ankle
- *Perceived Burden to Others

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Access to Lethal Means:

Access to lethal means was discussed with Stephanie. She denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - UH, HM, TV

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 1:30 AM
Session end: 1:45 AM

rcd

Ryan Dingess, CSW

Electronically Signed

Service Location: Turn

Audit Log

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947
Attson, Stephanie
ID: 151 DOB: 8/18/1987
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/29/2023
7:46 PM

Presenting Problem:
Stephanie continues to experience anxiety.
Symptoms of depression continue to be described.
Symptoms of mood swings continue to be described.

Recent History:
Alcohol and substance abuse,
impairment in the functional domains of independent living, working, and learning.
Client has an injured leg due to being attacked by several people prior to staying at the shelter.

Social Support Changes:
Stephanie's family or social support network has occurred no changes.

Intervention:
Client was assisted with her nightly medications in order to help keep her stable.

Assessment:
Stephanie presents as friendly, communicative, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Stephanie's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

History of Risk Factors:
*History of Abuse:
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*Serious Current Medical Problems

Suicide Risk Assessment:
Stephanie denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Stephanie's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts

Service Location

Turn

Audit Log

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7/30/23, 6:50 PM

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SOS
610 N. Silver St
Silver City, NM 88061

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Use Note Creation Time
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7/29/2023
7:46 PM

Attson, Stephanie

ID: 151 DOB: 8/18/1987

Case Management Note (SOS)

Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

History of Risk Factors:

- *History of Abuse:
- *History of Alcohol or Substance Abuse

Current Risk Factors:

- *Absent or Weak Support System:
- *Experiencing Severe Anxiety or Panic
- *Serious Current Medical Problems

Suicide Risk Assessment:

Stephanie denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, Stephanie's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, Stephanie's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:

Access to lethal means was discussed with Stephanie. She denies having access to lethal means at this time.

1 Unit for H2015 Comprehensive Community Support Services - TV, UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 7:30 PM
Session end: 7:45 PM

T.Y

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location
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SOS
810 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Attson, Stephanie

ID: 151 DOB: 8/18/1987
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/29/2023

6:01 PM

Presenting Problem:
She continues to experience symptoms of anxiety.
Stephanie continues to experience depression.
Symptoms of mood swings continue to be described.

Recent History:
Alcohol and substance abuse,
impairment in the functional domains of independent living, working, and learning.
Client has an injured leg due to being attacked by several people prior to staying at the shelter.

Social Support Changes:
Stephanie's family or social support network has occurred no changes.

Intervention:
Client was assisted with hygienic necessities so that she may shower and maintain proper self care.

Assessment:
Stephanie appears friendly, communicative, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Stephanie's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

History of Risk Factors:
*History of Abuse:
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*Serious Current Medical Problems

Suicide Risk Assessment:
Stephanie denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Stephanie's current risk of suicide is considered

Service Location
Turn

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7/30/23, 6:50 PM

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Attson, Stephanie

ID: 151 DOB: 8/18/1987

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/29/2023

6:01 PM

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Plan:

Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

History of Risk Factors:

*History of Abuse:

*History of Alcohol or Substance Abuse

Current Risk Factors:

*Absent or Weak Support System:

*Experiencing Severe Anxiety or Panic

*Serious Current Medical Problems

Suicide Risk Assessment:

Stephanie denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, Stephanie's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, Stephanie's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:

Access to lethal means was discussed with Stephanie. She denies having access to lethal means at this time.

1 Unit for H2015 Comprehensive Community Support Services - UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 4:15 PM

Session end: 4:30 PM

T.Y

Ryan Dingess, CSW

Electronically Signed

By Ryan Dingess, CSW

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Show Notes in List

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610 N. Silver St
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575-956-6131
575-956-6947

Use Note Creation Time

Clear Time

Set Date/Time

Attson, Stephanie

7/29/2023
1:18 PM

ID: 151 DOB: 8/18/1987

Case Management Note (SOS)

Presenting Problem:
Stephanie continues to experience anxiety.
Depressive symptoms continue.

Recent History: Client has a history of chronic homelessness, unemployment, anxiety, depression

Social Support Changes:
No changes in Stephanie's family or social support network have occurred.

Case Management Services for Stephanie were provided today as follows:
-Provided client her afternoon medications today.

Assessment:
Stephanie appears calm, friendly, downcast, attentive, communicative, casually groomed, normal weight, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Affect is appropriate, full range, and congruent with mood.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

History of Risk Factors:
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Experiencing Severe Anxiety or Panic
*A Major Depression is Present
*Severe Financial Difficulty

Suicide Risk:
Based on the above risk factors, Stephanie's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

2 Units for H2015 Comprehensive Community Support Services - HM, TV

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 12:00 PM
Session end: 12:30 PM

Service Location

Audit Log

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Use Note Creation Time
Clear Time
Set Date/Time

7/29/2023
1:18 PM

Attson, Stephanie

ID: 151 DOB: 8/18/1987

Case Management Note (SOS)

Recent History: Client has a history of chronic homelessness, unemployment, anxiety, depression

Social Support Changes:
No changes in Stephanie's family or social support network have occurred.

Case Management Services for Stephanie were provided today as follows:
-Provided client her afternoon medications today.

Assessment:
Stephanie appears calm, friendly, downcast, attentive, communicative, casually groomed, normal weight, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Affect is appropriate, full range, and congruent with mood.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

History of Risk Factors:
*History of Alcohol or Substance Abuse

Current Risk Factors:
*Experiencing Severe Anxiety or Panic
*A Major Depression is Present
*Severe Financial Difficulty

Suicide Risk:
Based on the above risk factors, Stephanie's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

2 Units for H2015 Comprehensive Community Support Services - HM, TV

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 12:00 PM
Session end: 12:30 PM

JW

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location
Turn

Audit Log

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1 of 1

7/30/23, 6:52 PM

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947
Attson, Stephanie
ID: 151 DOB: 8/18/1987
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/28/2023
6:04 PM

Presenting Problem:
Anxiety is still experienced by Stephanie.
Symptoms of depression continue to be described.
Mood swings continue.

Recent History:
Alcohol and substance abuse, impairment in the functional domains of independent living, working, and learning.
Client has an injured leg due to being attacked by several people prior to staying at the shelter.

Social Support Changes:
No changes in her family or social support network have occurred.

Intervention:
Prompted client to fulfill contractual obligations so that she may continue to stay overnight at the shelter.

Assessment:
Stephanie appears friendly, attentive, She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Judgment appears intact. There are signs of anxiety. There are no signs of hyperactive or attentional difficulties. Stephanie's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue to prompt client to fulfill contractual obligations as needed and encourage client to participate in programming plans.

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Abuse:

Current Risk Factors:
*Absent or Weak Support System:
*Experiencing Severe Anxiety or Panic
*Serious Current Medical Problems

Suicide Risk Assessment:
She denies suicidal ideas or intentions.

Suicide Risk:

Service Location

Audit Log

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Print Preview

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1 of 1

7/30/23, 6:52 PM

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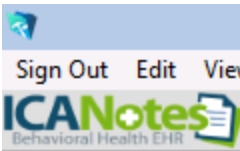


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SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Attson, Stephanie

ID: 151 DOB: 8/18/1987
Case Management Note (SOS)

Use Note Creation Time
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7/28/2023
6:04 PM

Service Location
Turn

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Continue to prompt client to fulfill contractual obligations as needed and encourage client to participate in programming plans.

History of Risk Factors:

- *History of Alcohol or Substance Abuse
- *History of Abuse:

Current Risk Factors:

- *Absent or Weak Support System:
- *Experiencing Severe Anxiety or Panic
- *Serious Current Medical Problems

Suicide Risk Assessment:

She denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, Stephanie's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, Stephanie's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:

Access to lethal means was discussed with Stephanie. She denies having access to lethal means at this time.

1 Unit for H0038 Peer Support - UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 5:15 PM
Session end: 5:30 PM

T.Y

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

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Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Find

Stephanie Attson
(8/18/1987) #151
Account ID# 13611108

Chart Face

Demographics

Make Appoi

Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$159.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$159.32	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$159.32	Not A

The option for default service charge responsibility has been moved to the group level settings and directories, in the ac tab.

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/30/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/29/2023 H2015 Comprehensive Community Ryan Dingess, CSW	39.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$39.32	\$0.00
7/29/2023 H2015 Comprehensive Community Ryan Dingess, CSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/29/2023 H2015 Comprehensive Community Ryan Dingess, CSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/28/2023 H0038 Peer Support Ryan Dingess, CSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/28/2023 H0038 Peer Support Ryan Dingess, CSW	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/27/2023 H0038 Peer Support Ryan Dingess, CSW	60.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$60.00	\$0.00
7/27/2023 H2015 Comprehensive Community Ryan Dingess, CSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00

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Add Late Fee

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Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Clinical Order Sheets

Treatment

Due: (See In)

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Entire

This is the Chart Face for: **Yazzie, Joshua** ID: **153** DOB: **7/5/1984** 39 Y

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Enlarge

Filter Notes >> Show All Showing 5 of 5 Notes

1) 7/30/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:
Anxiety is still experienced by Joshua.
Confusion

2) 7/27/23 CAW GAD-7: Generalized Anxiety Disorder SOS Compiled Note Work Areas

Form Title: GAD-7: Generalized Anxiety Disorder Screener
This custom form has been saved as a PDF.

You can view and print the custom form by previewing the compiled note and clicking the "View PDF" button OR by going to the Patient Documents under Patient Records.

3) 7/27/23 ST Treatment Plan (SOS) SOS Compiled Note Work Areas

TREATMENT PLAN FOR JOSHUA YAZZIE
A treatment plan was created or reviewed today, 7/27/2023, for Joshua Yazzie.
Meeting Start: 9:45 AM - Meeting End: 10:30 AM
This was a 90 Day Treatment Plan.

Participant(s) Developing the Plan:

Active Problem/Need List

Current Medications Print List Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

HEALTH CONCERNS AND RISKS:

History of Subst. Abuse

Chart Reminders

Supp.

ED Visit

Add or Update Managed Care Authorizations

Assessment

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Clinical Msg

Rx Called In

Med Pickup

*Reminders

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ICANotes Behavioral Health EHR		Continue	Photo
Demographics		Chart Details	Yazzie, Joshua Patient's Name
		Go to E-Prescribe	153 Patient's ID
			39 Yrs DOB 7/5/1984
		Anaphylactic Reaction Reported <input type="checkbox"/>	Patient Reviewed Demographics
Patient Information		Insurance Information	
*Name (F,M,L,Suffix) Joshua Yazzie		*Date of Birth 7/5/1984 Age: 39	
<input checked="" type="checkbox"/> Homeless Address 610 Silver St.		Unique Patient ID 153	
<input type="checkbox"/> Bad Address Addr 2 / Appt #		*Gender man *Sex: M	
<input type="checkbox"/> Sample City, State, Zip Silver City NM 88061		Refer to patient as Joshua	
<input type="checkbox"/> Chart Best Phone Home Phone Cell Phone Work Phone		SSN # 585-53-4769	
Patient Status <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Pending		Alt. Patient ID	
API <input type="checkbox"/>		Room:	
Appt Reminders via: <input type="checkbox"/> Email <input type="checkbox"/> Text Message <input type="checkbox"/> Phone Message		Extra Privacy <input type="checkbox"/> API	
Employment Status		Other Names	
School or Employer		Previous Address	
Grade			
Marital Status married			
Sexual Orientation Straight or heterosexual			
*Ethnicity Native American			
Ethnicity 2			
Religion Christian			
Annual Household Income			
Family Size			
Veteran <input type="radio"/> Y <input type="radio"/> N			
*Race			
Race 2			
*Preferred Language			
Disability			
		Release of Info	
		Patient Calendar Note	
		Adv. Dir.	
		Miscellaneous Notes	
		Custom Fields	

Patient's Condition
Date Of Current Illness Onset Date Of Similar Illness
Date of Current Admission: From To
Admitting DX
Dates Unable To Work: From To
Condition Related To Employment? ☐ Yes ☒ No
Condition Related To Auto Accident? ☐ Yes ☒ No
Condition Related To Other Accident? ☐ Yes ☒ No
State Of Accident
In treatment Previously? ☐ Y ☐ N If yes, where?
Date Of Death Preliminary Cause

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575-956-6947

Medicaid ID: Y1F905154145

Yazzie, Joshua

ID: 153 DOB: 7/5/1984

Case Management Note (SOS)

Use Note Creation Time

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7/30/2023
1:11 AM

Presenting Problem:
Anxiety is still experienced by Joshua.
Confusion

Joshua continues to experience mood swings.

Social Support Changes:
Client was recently released from jail after four months.

Recent History: Client is impaired in the functional domain(s) of:
learning
recreation
Independent living
working

alcohol dependency

Client was released from jail.
Client is suspected of continued use

THERAPEUTIC INTERVENTION: Client was comforted as he stated that he was intoxicated and wanted medical assistance. Client explained that he has not felt well for two days. Client was offered assistance to stand or sit up. Client was laying face down in a shelter hallway as staff asked if there was anything that they could do. Limit setting was provided as the client

Audit Log

Service Location: SOS

Turn Name In Header ON or OFF off

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Create Discharge Summ

Go to Therapy Groups

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7/30/2023 1:11:29 AM

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7/30/2023 1:11:29 AM Rya

7/30/2023 12:50:37 AM Rya

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Medicaid ID: YIF905154145

Yazzie, Joshua

ID: 153 DOB: 7/5/1984

Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/30/2023
1:11 AM

was offered assistance to stand or sit up. Client was laying face down in a shelter hallway as staff asked if there was anything that they could do. Limit setting was provided as the client was attempted to be reasoned with as it was explained that he was impeding a walk way. EMT's were dispatched and the client was taken to the hospital for further treatment and observation.

This session the therapeutic focus was on emotional support.

Assessment:

Joshua was physically inactive and anergic today, barely moving. His body language and posture suggested that depression was present. Client presented as confused. Client was unresponsive to instructions. Client spoke in repetitive fragments. Client's words were mumbled and incoherent. Client spoke in low volume. Client could not stand. Client's insight and his judgment appear to be poor. Client was casually dressed.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

History of Risk Factors:

- *History of Abuse:
- *History of Alcohol or Substance Abuse

Current Risk Factors:

- *Absent or Weak Support System:
- *Experiencing Severe Anxiety or Panic
- *Current Alcohol Abuse is Present
- *Substance Abuse is a Current Problem

Suicide Risk Assessment:

Suicidal plans or intentions are denied by Joshua.

Suicide Risk:

Based on the above risk factors, Joshua's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:

Based on the above risk factors, Joshua's risk of violence is considered Low. Aggressive or violent impulses are intermittent or fleeting without plan or intent.

Access to Lethal Means:

Service Location

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Medicaid ID: Y1F905154145

Yazzie, Joshua

ID: 153 DOB: 7/5/1984

7/30/2023

1:11 AM

Case Management Note (SOS)

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

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*Absent or Weak Support System:
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*Substance Abuse is a Current Problem

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Suicide Risk:

Based on the above risk factors, Joshua's risk of suicide is considered Low. Fleeting thoughts may be present but there is no intention or plan.

Violence Risk:

Based on the above risk factors, Joshua's risk of violence is considered Low. Aggressive or violent impulses are intermittent or fleeting without plan or intent.

Access to Lethal Means:

Access to lethal means was discussed with Joshua. He denies having access to lethal means at this time.

3 Units for H0038 Peer Support - UH, HM, TV

Time spent face to face with patient and/or family and coordination of care: 45 min

Session start: 9:15 PM

Session end: 10:00 PM

rcd

Ryan Dingess, CSW

Electronically Signed

By Ryan Dingess, CSW

Service Location

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575-956-6947
Medicaid ID: YIF905154145
Yazzie, Joshua
ID: 153 DOB: 7/5/1984
Treatment Plan (SOS)

Use Note Creation Time
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7/27/2023
10:18 AM

TREATMENT PLAN FOR JOSHUA YAZZIE
A treatment plan was created or reviewed today, 7/27/2023, for Joshua Yazzie.
Meeting Start: 9:45 AM - Meeting End: 10:30 AM
This was a 90 Day Treatment Plan.

Participant(s) Developing the Plan:
Silver Tabor, BHW, CSW (Counselor)

Diagnosis:

PROBLEM / NEEDS:
Problem / Need # 1: Housing/Living Environment Deficiency
Problem / Need # 2: Economic Problem

Problem / Need: HOUSING/LIVING ENVIRONMENT DEFICIENCY

PROBLEM: Housing/Living Environment Deficiency
Joshua's housing/living environment deficiency is an active need that affects his recovery environment and requires intervention. It is primarily manifested by:
Homelessness: Details as follows
**Living in Shelters*
Joshua needs to comply with shelter regulations and needs to apply for government subsidized housing.

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#2 Signed By: Clinician
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#3 Signed By:

Calendar
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Create Discharge Summary
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<p style="text-align: center;">SOS 610 N. Silver St Silver City, NM 88061</p> <p style="text-align: center;">575-956-6131 575-956-6947</p> <p>Medicaid ID: YIF905154145</p>	<p>Yazzie, Joshua</p> <p>ID: 153 DOB: 7/5/1984</p> <p>Treatment Plan (SOS)</p>	<div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Use Note Creation Time</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Clear Time</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Set Date/Time</div> <p>7/27/2023</p> <p>10:18 AM</p>
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Joshua needs to comply with shelter regulations and needs to apply for government subsidized housing.

LONG TERM GOAL:
 Joshua will obtain appropriate housing.
 Target Date: 10/27/2023
 Completion Date: 10/27/23

SHORT TERM GOAL(S) & INTERVENTIONS:
 Short Term Goal / Objective:
 Joshua will seek and apply for all viable housing options until stable long term housing is secured.
 Frequency: twice per week Duration: one hour Progress: Plans to start soon
 Status: Effective

Intervention:
CSS/CSSA/CSI/CC will assist Joshua to explore housing options such as friends, family, acquaintances, to obtain emergency housing. Progress will be monitored.
 Frequency: twice per week Duration: one hour Clinician: Silver Tabor, BHW, CSW

STATUS:
 7/27/2023: The undersigned clinician met with the patient (and family, as appropriate) on the date above in a face to face meeting to work with him/her in developing this Treatment Plan. Fair progress in reaching set goals and resolving this problem seemed apparent today. Recommend continuing the current interventions and short term goals. It is felt that more time is needed for the interventions to work.
 Joshua will comply with SPIN housing regulations for short term shelter until permanent housing is secured.
 Joshua will actively seek government housing and will apply for appropriate programs for assistance. Joshua will keep all appointments to meet this goal.

Problem / Need: ECONOMIC PROBLEM

PROBLEM: Economic Problem
 Joshua's economic problem is an active need that affects his recovery environment and requires intervention. It is primarily manifested by:
Unemployment: Details are as follows:
 *Difficulty Finding Employment Due to Criminal History.
 Joshua has a history of alcohol and substance abuse which have led to periods of unemployment.

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Medicaid ID: YIF905154145

Yazzie, Joshua

ID: 153 DOB: 7/5/1984

7/27/2023

10:18 AM

Treatment Plan (SOS)

Difficulty Finding Employment Due to Criminal History.

Joshua has a history of alcohol and substance abuse which have led to periods of unemployment.

LONG TERM GOAL:

Joshua will improve overall economic status through employment.

Target Date: 10/27/2023

Completion Date: 10/27/23

SHORT TERM GOAL(S) & INTERVENTIONS:

Short Term Goal / Objective:

Joshua to seek and apply for all viable employment opportunities of at least times per month until appropriate employment is secured.

Frequency: once per day

Duration: to tolerance

Progress: Plans to start soon

Status: Effective

Intervention:

CSS/CSA/CSI/CC will assist Joshua with appropriate applications from applicable agencies to assist in obtaining applicable entitlements Progress will be monitored and documented.

BARRIERS

- client expresses feeling mild anxiety symptoms

- Increase social support system

- Assist in finding community support

STRENGTHS

Joshua's strengths include:

Cognitive

- Intellectually bright

- Can make needs known

- Verbal

Behavioral

Generally compliant

Service Location

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7/27/2023

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7/27/2023


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#3 Signed By:

1 of 1

7/30/23, 6:58 PM

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Medicaid ID: YIF905154145

Yazzie, Joshua

ID: 153 DOB: 7/5/1984

7/27/2023 10:18 AM

Treatment Plan (SOS)

BARRIERS

- client expresses feeling mild anxiety symptoms

- Increase social support system

- Assist in finding community support

STRENGTHS

Joshua's strengths include:

Cognitive

- Intellectually bright

- Can make needs known

- Verbal

Behavioral

- Generally compliant

Motivation

- Is motivated for treatment

Signature below indicates that this Treatment Plan has been reviewed and approved:

Date: _____ Clinician: _____ Title: _____

Date: _____ Clinician: _____ Title: _____

Date: _____ Patient/Client: _____

Date: _____ Parent/Guardian: _____

Date: _____ Other: _____

A copy of this treatment plan was: _____ given to the patient/client/family OR _____ declined by the patient/client/family:

Date: _____ Clinician: _____ Title: _____

Electronically Signed

Dr. Silver-Tabor, DMSW, CSW

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#1 Signed By: Joshua

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#2 Signed By: Clinician

7/27/2023

Capture Signature

#3 Signed By: _____

1 of 1

7/30/23, 6:59 PM

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Yazzie, Joshua

ID: 153 DOB: 7/5/1984
Treatment Plan (SOS)

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7/27/2023
7:10 AM

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TREATMENT PLAN FOR JOSHUA YAZZIE

A treatment plan was created or reviewed today, 7/27/2023, for Joshua Yazzie.
Meeting Start: 7:00 AM - Meeting End: 7:10 AM
This was a 90 Day Treatment Plan.

Diagnosis:

PROBLEM / NEEDS:
Problem / Need # 1: Transportation

Problem / Need: TRANSPORTATION

PROBLEM: Transportation
Joshua's transportation is an active need that affects his recovery environment and requires intervention. It is primarily manifested by:
needs I.D./ license

Loss of Driving Privileges: Details as follows:
*Due to DUI
Loss of Reliable Transportation: Details as follows: caused by DUI

LONG TERM GOAL:
Joshua will obtain a state issued driver's license.
Target Date: 10/27/2023

SHORT TERM GOAL(S) & INTERVENTIONS:
Short Term Goal / Objective:
Joshua will continue process of obtaining and maintaining reliable transportation.
Frequency: twice per day Duration: 30 minutes Progress: Plans to start soon
Target Date: 8/27/2023

Intervention:
Counselor will encourage Joshua and support process of obtaining and maintaining reliable transportation. Progress will be monitored.
Frequency: once per week Duration: 15 minutes Clinician: Christina Wolford, LCSW

STATUS:
7/27/2023: The undersigned clinician met with the patient (and family, as appropriate) on the

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575-958-6947

Use Note Creation Time

Clear Time

Set Date/Time

Medicaid ID: YIF905154145

Yazzie, Joshua

7/27/2023

7:10 AM

ID: 153 DOB: 7/5/1984

Treatment Plan (SOS)

Frequency: once per week Duration: 15 minutes Clinician: Christina Wolford, LCSW

STATUS:

7/27/2023: The undersigned clinician met with the patient (and family, as appropriate) on the date above in a face to face meeting to work with him/her in developing this Treatment Plan. Fair progress in reaching set goals and resolving this problem seemed apparent today. Recommend continuing the current interventions and short term goals. It is felt that more time is needed for the interventions to work.

BARRIERS

- client expresses feeling mild anxiety symptoms

STRENGTHS

Joshua's strengths include:

Cognitive

- Intellectually bright
- Can make needs known
- Verbal

Signature below indicates that this Treatment Plan has been reviewed and approved:

Date: _____ Clinician: _____ Title: _____

Date: _____ Patient/Client: _____

Date: _____ Parent/Guardian: _____

Date: _____ Other: _____

A copy of this treatment plan was: _____ given to the patient/client/family OR _____ declined by the patient/client/family:

Date: _____ Clinician: _____ Title: _____

Electronically Signed

By: Ryan Dineen, CSW

Service Location

Turn

Audit Log

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7/30/23, 7:00 PM

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Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Clinical Order Sheets

Treatment

Due: 9/8/20

Delet Entire

McKee Young, Danny Rey

This is the Chart Face for: **McKee Young, Danny** ID: 1000010699747 DOB: 12/22/1985 37 Y

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)

Mood disorder due to known physiological

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

NOTES & RISK FACTORS:

Chart Reminders

Supp.

ED Visit

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 177 of 177 Notes

1) 7/29/23 CW Group Therapy Note (SPIN Supporting People In Need) Compiled Note Work Areas

Time spent face to face with patient and/or family and coordination of care: 60 min

Session start: 8:30 AM

Session end: 9:30 AM

2) 7/25/23 JF Progress Note (Non-Rx) (SPIN Supporting People In Need) Compiled Note Work Areas

Danny Rey responded today to an immediate request for a session with SPIN Transition House CPSW for the purpose of addressing his lack of attendance at meetings, meanwhile establishing goals which he is motivated to achieve (motivational interviewing as well as Peer Support utilized.)

He promptly apologized for his lack of participation in programming, accepting responsibility and

3) 7/22/23 CW Group Therapy Note (SPIN Supporting People In Need) Compiled Note Work Areas

Time spent face to face with patient and/or family and coordination of care: 60 min

Session start: 8:30 AM

Session end: 9:30 AM

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Clinical Msg

Rx Called In

Med Pickup

*Reminders

Send a Message

Calendar

Appt History

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1 of 1

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Chart Room Chart Face Back

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Show Notes in List

+ New Note

Men's Transitional House Silver City
1307 N. Swan St
Silver City, NM 88061

575-956-6242
575-956-6947

McKee Young, Danny Rey

ID: 1000010699747 DOB: 12/22/1985

Use Note Creation Time

Clear Time

Set Date/Time

7/29/2023
12:53 PM

Group Therapy Note (SPIN Supporting People In Need)

Time spent face to face with patient and/or family and coordination of care: 60 min
Session start: 8:30 AM
Session end: 9:30 AM

Session Remarks:
Therapy Type:
Psychodynamic/Psychoanalytic

Clients reflected on patterns in thoughts and behaviors. The goal is to create self awareness and understanding of unconscious processes that dictate current behaviors.

Group Type:
The focus of today's group was on the subject of self awareness. The purpose was to explore with group members the concept of self awareness, including how it effects behavior and relationships and how to improve self awareness. The confrontation and challenging of irrational ideas and negative self appraisals was explored.
Present Today:
Present at today's session were the following: 12 members. Group facilitated by Christina Wolford, lcsw.
Group Leader Interventions:
Therapist allowed client to direct art or activity toward goal of building self awareness.
Facilitated Group Process
Extrapolated to Life

Service Location: SPIN Supporting People In

Turn Name In Header ON or OFF off

Audit Log

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Go to WORK Areas

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Make Referral

Create Clinical Summa

Create Discharge Summ

Go to Therapy Group:

Change Note Title

This Note was eSigned
7/29/2023 12:53:13 PM

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1 of 1

7/30/23, 7:02 PM

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12:53 PM

McKee Young, Danny Rey

ID: 1000010699747 DOB: 12/22/1985

Group Therapy Note (SPIN Supporting People In Need)

Service Location
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Extrapolated to Life
Therapist provided psycho-education regarding behavior management techniques.
Helped group members set limits and boundaries
Made Therapeutic Interpretations
Plan:
Continue Skill Development
Encourage increased participation.
Continue group.

Individual Remarks:
Appearance and Behavior:
In today's session Mr. McKee Young appeared calm, flat, wary, communicative, and tense.
Participation:
Mr. McKee Young's participation today, was normal, with responses to others and sharing of personal experiences and feelings.
Verbal Content:
Mr. McKee Young spoke of interpersonal problems today, during the session.
Mental Status Exam:
He was glum and unanimated. Facial expression and body posture suggest an underlying depressed mood. Mr. McKee Young displayed signs of anxiety.
There are no signs of hallucinations, delusions, thought disorder or other signs of psychotic process.
Suicidal/Homicidal:
Suicidal ideas or intentions are not in evidence and were not expressed by Mr. McKee Young today.
Mr. McKee Young convincingly denied homicidal ideas in today's session.
Stage of Change:
Contemplation

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.
Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)
Mood disorder due to known physiological condition with major depressive-like episode,

Men's Transitional House Silver City
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McKee Young, Danny Rey

ID: 1000010699747 DOB: 12/22/1985

Group Therapy Note (SPIN Supporting People In Need)

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7/29/2023
12:53 PM

He was grim and unanimated. Facial expression and body posture suggest an underlying depressed mood. Mr. McKee Young displayed signs of anxiety.

There are no signs of hallucinations, delusions, thought disorder or other signs of psychotic process.

Suicidal/Homicidal:

Suicidal ideas or intentions are not in evidence and were not expressed by Mr. McKee Young today.

Mr. McKee Young convincingly denied homicidal ideas in today's session.

Stage of Change:

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Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)

Mood disorder due to known physiological condition with major depressive-like episode, F06.32 (ICD-10) (Active)

Social phobia, generalized, F40.11 (ICD-10) (Active)

Axis III: See Medical History

Axis IV: Housing
Economic

Axis V: 45 (Current GAF)

NOTES & RISK FACTORS:

1 Unit for 90853 Group psychotherapy

Christina Wolford, LCSW
(Note Compiled by: Lauren Davenport, CPSW)

Electronically Signed

Service Location: Turn

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McKee Young, Danny Rey

ID: 1000010699747 DOB: 12/22/1985

Use Note Creation Time

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Set Date/Time

7/25/2023

2:38 PM

Progress Note (Non-Rx) (SPIN Supporting People In Need)

Danny Rey responded today to an immediate request for a session with SPIN Transition House CPSW for the purpose of addressing his lack of attendance at meetings, meanwhile establishing goals which he is motivated to achieve (motivational interviewing as well as Peer Support utilized.)

He promptly apologized for his lack of participation in programming, accepting responsibility and answering questions frankly. From this positive foundation Transitional Program was assessed with new short goals set.

Mr. McKee Young is experiencing significant stress as a result of "loosing people" to the use of fentanyl addiction, and recently was required to intervene in an overdose scenario. Interpersonal communication, limit setting for self-care strategies including distancing was pursued.

Travel was explored as a possible coping strategy by Danny Rey, along with the necessary budgeting concerns.

A second session addressing these same issues (substance use, social support, and programming motivation) was scheduled for later in the week with CPSW.

Danny Rey expressed gratitude for the ability to convey these recent troubling experiences and the opportunity for further programming assistance)an appointment with therapist was reinforced for the following day.)

MEDICAL HISTORY:

Currently takes Keppra for siezures. Danny has memory loss and difficulty with pace and concentration. He is oriented to time and day.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Post-traumatic stress disorder, chronic, F43.12 (ICD-10) (Active)

Mood disorder due to known physiological condition with major depressive-like episode, F06.32 (ICD-10) (Active)

Social phobia, generalized, F40.11 (ICD-10) (Active)

Axis III: See Medical History
Axis IV: Housing
Economic
Axis V: 45 (Current GAF)

Service Location

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McKee Young, Danny Rey

ID: 1000010699747 DOB: 12/22/1985

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7/25/2023
2:38 PM

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Mood disorder due to known physiological condition with major depressive-like episode, F06.32 (ICD-10) (Active)
Social phobia, generalized, F40.11 (ICD-10) (Active)

Axis III: See Medical History
Axis IV: Housing
 Economic
Axis V: 45 (Current GAF)

NOTES & RISK FACTORS:

H0038 Peer Support - HN

Time spent face to face counseling patient and/or family: 90 min

Session start: 10:00 AM
Session end: 11:30 AM

Service Location

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Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Find

Danny Rey McKee Young
(12/22/1985) #1000010699747
Account ID# 13563590

Chart Face

Demographics

Make Appoi

Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options
☒ All Charges ☐ Charges with Balances

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$802.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$802.36	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$802.36	Not A

The option for default service charge responsibility has been moved to the group level settings and directories, in the ac tab.

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/29/2023 90853 Group psychotherapy Christina Wolford, LCSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/25/2023 H0038 Peer Support Jeffrey "Yaakov" Finer,	15.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$15.00	\$0.00
7/22/2023 90853 Group psychotherapy Christina Wolford, LCSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/17/2023 90853 Group psychotherapy Jeffrey "Yaakov" Finer,	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/15/2023 90853 Group psychotherapy Christina Wolford, LCSW	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$120.00	\$0.00
7/14/2023 H2015 Comprehensive Community Jeffrey "Yaakov" Finer,	23.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$23.68	\$0.00
7/13/2023 H2015 Comprehensive Community Michelle Grayless, MSW,	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/12/2023 H0038 Peer Support Group Lawren Davenport, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/12/2023 90837 Psychotherapy 60 min. Michelle Grayless, MSW,	125.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$125.00	\$0.00

Refresh All From Note

Add Late Fee

Therapy Groups

Make Appoi

Additional Patient Information

Claims

☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the acctab.

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$802.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$802.36	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$802.36	Not A

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Add Late Fee

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PAA

Telephone Intake Form

Demographics

Most Recent Note of Mine

Most Recent Note

Documents

Logs

Clinical Order Sheets

Treatment

Due: (See In)

Delet

Entire

This is the Chart Face for: **Lazzell, Shanti** ID: 1000010700116 DOB: 11/30/1970 52 Y

Convert DSM to ICD10

Current Diagnosis (Axis I - V)

Paranoid schizophrenia, F20.0 (ICD-10) (Active)

Sheltered homelessness, Z59.01 (ICD-10) (Active)

Active Problem/Need List

Current Medications

Print List

Enlarge

Adverse Drug Reactions and Allergies/Intolerances: Active List

Health Concerns and Risk Factors

NOTES & RISK FACTORS:

History of suicidal attempts

Has been self injurious

Chart Reminders

Supp.

ED Visit

Add or Update Managed Care Authorizations

Filter Notes >>

Show All

Showing 614 of 614 Notes

1) 7/29/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:

She continues to experience symptoms of anxiety.

Ms. Lazzell continues to experience depression.

2) 7/29/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:

Anxiety is still experienced by Ms. Lazzell.

Symptoms of depression continue to be described.

Mood swings continue.

3) 7/27/23 RD Case Management Note (SOS) SOS Compiled Note Work Areas

Presenting Problem:

Anxiety is still experienced by Ms. Lazzell.

Symptoms of depression continue to be described.

Pre-Admission

Chem Dependency (6 ASAM Dimensions)

Complete Assessment (of your discipline)

Forms/Assessments

Form Builder

Progress Note (select your specialty)

Prescriber

Therapist

Nursing

Couples/Family Therapy

Dietitian

Play Therapy

Case/Social Worker

Quick Note

Clinical Msg

Rx Called In

Med Pickup

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Lazzell, Shanti

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+ New Note

SOS
810 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947
Lazzell, Shanti
ID: 1000010700116 DOB: 11/30/1970
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/29/2023
8:02 PM

Presenting Problem:
She continues to experience symptoms of anxiety.
Ms. Lazzell continues to experience depression.

Recent History:
Client has a history of chronic homelessness, unemployment, substance abuse, anxiety, depression, paranoid schizophrenia, and hallucinations.

Social Support Changes:
No changes in Ms. Lazzell's family or social support network have occurred.

Intervention:
Client was assisted with her nightly medications in order to help keep her stable.

Assessment:
Ms. Lazzell presents as flat, minimally communicative, and tense. Her speech cannot be tested. Mood cannot be assessed. It is not possible to determine if underlying psychotic symptoms are present. There are signs of anxiety. Ms. Lazzell is restless. Ms. Lazzell's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:
Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

Diagnosis: Paranoid schizophrenia, F20.0 (ICD-10) (Active)
Sheltered homelessness, Z59.01 (ICD-10) (Active)

Audit Log

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Create Clinical Summary

Create Discharge Summary

Go to Therapy Groups

Change Note Title

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7/29/2023 8:03:02 PM Rya

1 of 1

7/30/23, 7:10 PM

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
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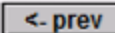
Chat/Help

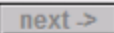
 Behavioral Health EHR

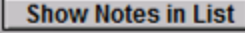
 Chart Room

 Chart Face

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 Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970

Use Note Creation Time

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7/29/2023
8:02 PM

Case Management Note (SOS)

Diagnosis: Paranoid schizophrenia, F20.0 (ICD-10) (Active)
Sheltered homelessness, Z59.01 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Mental Illness:
 Carries a Diagnosis of Manic Depressive Illness
 Carries a Diagnosis of Schizophrenia
 History of Severe Anxiety or Panic Attacks

Current Risk Factors:
*Absent or Weak Support System:
*Agitated or Very Angry:
*A Major Depression is Present
*Rapid Shifts in Mood are Occurring
*Carries a Diagnosis of Schizophrenia

Suicide Risk Assessment:
Ms. Lazzell denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Ms. Lazzell's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Ms. Lazzell's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Ms. Lazzell. She denies having access to lethal means at this time.

1 Unit for H2015 Comprehensive Community Support Services - TV, UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 7:45 PM
Session end: 8:00 PM

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Service Location

Audit Log

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SOS
810 N. Silver St
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Lazzell, Shanti

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7/29/2023

8:02 PM

*History of Alcohol or Substance Abuse
*History of Mental Illness:

Carries a Diagnosis of Manic Depressive Illness
Carries a Diagnosis of Schizophrenia
History of Severe Anxiety or Panic Attacks

Current Risk Factors:
*Absent or Weak Support System:
*Agitated or Very Angry:
*A Major Depression is Present
*Rapid Shifts in Mood are Occurring
*Carries a Diagnosis of Schizophrenia

Suicide Risk Assessment:
Ms. Lazzell denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Ms. Lazzell's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Ms. Lazzell's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Ms. Lazzell. She denies having access to lethal means at this time.

1 Unit for H2015 Comprehensive Community Support Services - TV, UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 7:45 PM
Session end: 8:00 PM

T.Y.

Ryan Dingess, CSW

Electronically Signed
By Ryan Dingess, CSW

Service Location

Turn

Audit Log

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7/30/23, 7:11 PM

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SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947
Lazzell, Shanti
ID: 1000010700116 DOB: 11/30/1970
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/29/2023
1:04 PM

Presenting Problem:
Anxiety is still experienced by Ms. Lazzell.
Symptoms of depression continue to be described.
Mood swings continue.

Recent History: Client has a history of chronic homelessness, unemployment, anxiety, depression, stress, hallucinations, substance use, poverty.

Social Support Changes:
Ms. Lazzell's family or social support network has occurred no changes.

Case Management Services for Ms. Lazzell were provided today as follows:
-Provided client her afternoon medications today.

Assessment:
Ms. Lazzell appears downcast, listless, inattentive, minimally communicative, disheveled, underweight, and slow to respond. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Affect is appropriate, full range, and congruent with mood.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Paranoid schizophrenia, F20.0 (ICD-10) (Active)
Sheltered homelessness, Z59.01 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Anger Management Problems

Current Risk Factors:
*Experiencing Severe Anxiety or Panic
*Describes Command Hallucinations, details are as follows:
*A Major Depression is Present
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present:
Affect Flat or Blunted
*Impaired Impulse Control
*Severe Insomnia is Present
*Serious Current Medical Problems

Suicide Risk:

Service Location

Audit Log

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970

Use Note Creation Time

Clear Time

Set Date/Time

7/29/2023
1:04 PM

Case Management Note (SOS)

Assessment
Ms. Lazzell appears downcast, listless, inattentive, minimally communicative, disheveled, underweight, and slow to respond. She exhibits speech that is normal in rate, volume, and articulation and is coherent and spontaneous. Language skills are intact. Affect is appropriate, full range, and congruent with mood.

Plan: Continue to accommodate client to the best of shelter abilities and continue to prompt client to continue participating in programming plans now being implemented by shelter staff.

Diagnosis: Paranoid schizophrenia, F20.0 (ICD-10) (Active)
Sheltered homelessness, Z59.01 (ICD-10) (Active)

History of Risk Factors:
*History of Alcohol or Substance Abuse
*History of Anger Management Problems

Current Risk Factors:
*Experiencing Severe Anxiety or Panic
*Describes Command Hallucinations, details are as follows:
*A Major Depression is Present
*Severe Financial Difficulty
*Feelings of Hopelessness, Worthlessness, or Guilt are Present:
Affect Flat or Blunted
*Impaired Impulse Control
*Severe Insomnia is Present
*Serious Current Medical Problems

Suicide Risk:
Based on the above risk factors, Ms. Lazzell's risk of suicide is considered Moderate. Persistent passive wishes to be dead without actual intent or plan are present.

2 Units for H2015 Comprehensive Community Support Services - HM, TV

Time spent face to face with patient and/or family and coordination of care: 30 min

Session start: 11:30 AM
Session end: 12:00 PM

JW

Ryan Dingess, CSW

Electronically Signed
By: Ryan Dingess, CSW

Service Location

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Audit Log

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SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947
Lazzell, Shanti
ID: 1000010700116 DOB: 11/30/1970
Case Management Note (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

7/27/2023
8:23 PM

Service Location

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Presenting Problem:

Anxiety is still experienced by Ms. Lazzell.
Symptoms of depression continue to be described.

Recent History:

Client has a history of chronic homelessness, unemployment, substance abuse, anxiety, depression, paranoid schizophrenia, and hallucinations.

Social Support Changes:

No changes in her family or social support network have occurred.

Intervention:

Client was assisted with her nightly medications in order to help keep her stable.

Assessment:

Ms. Lazzell presents as flat, minimally communicative, and tense. Her speech cannot be tested. Mood cannot be assessed. It is not possible to determine if underlying psychotic symptoms are present. There are signs of anxiety. Ms. Lazzell is restless. Ms. Lazzell's behavior in the session was cooperative and attentive with no gross behavioral abnormalities.

Plan:

Continue accommodating client to the best of shelter abilities and prompt client to participate in programming plans.

Diagnosis: Paranoid schizophrenia, F20.0 (ICD-10) (Active)
Sheltered homelessness, Z59.01 (ICD-10) (Active)

History of Risk Factors:

*History of Alcohol or Substance Abuse
*History of Mental Illness:
Carries a Diagnosis of Manic Depressive Illness
Carries a Diagnosis of Schizophrenia
History of Severe Anxiety or Panic Attacks

Current Risk Factors:

*Absent or Weak Support System:
*Agitated or Very Angry:
*A Major Depression is Present
*Rapid Shifts in Mood are Occurring
*Carries a Diagnosis of Schizophrenia

Suicide Risk Assessment:

1 of 1

7/30/23, 7:12 PM

<p>SOS 610 N. Silver St Silver City, NM 88061</p> <p>575-956-6131 575-956-6947</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Lazzell, Shanti </div> <p>ID: 1000010700116 DOB: 11/30/1970</p> <p>Case Management Note (SOS)</p>	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Use Note Creation Time</div> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Clear Time</div> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Set Date/Time</div> <p>7/27/2023 8:23 PM</p>
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History of Alcohol or Substance Abuse:

History of Mental Illness:

Carries a Diagnosis of Manic Depressive Illness

Carries a Diagnosis of Schizophrenia

History of Severe Anxiety or Panic Attacks

Current Risk Factors:

*Absent or Weak Support System|

*Agitated or Very Angry:

*A Major Depression is Present

*Rapid Shifts in Mood are Occurring

*Carries a Diagnosis of Schizophrenia

Suicide Risk Assessment:

Ms. Lazzell denies suicidal ideas or intentions.

Suicide Risk:

Based on the absence of risk factors, Ms. Lazzell's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:

Based on the risk factors reviewed, Ms. Lazzell's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:

Access to lethal means was discussed with Ms. Lazzell. She denies having access to lethal means at this time.

1 Unit for H2015 Comprehensive Community Support Services - UH

Time spent face to face with patient and/or family and coordination of care: 15 min

Session start: 7:45 PM
Session end: 8:00 PM

T.Y.

Ryan Dingess, CSW

Electronically Signed

Service Location: Turkey

Audit Log

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Patient Account

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Auto Post Payments

Manual Post Payments

Online Post Payments

Therapy Groups

Shanti Lazzell

(11/30/1970) #1000010700116

Account ID# 13564444

Find

Chart Face

Demographics

Make Appoi

Additional Patient Information

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options

All Charges

Charges with Balances

New Service Charge

Collect Pre-Payment

Totals:

\$3,958.96

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Insurance:

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The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

Account Detail

Charge

Paid

Adjust.

Credit

Write-Off

Bad Debt

Recoup

Fee

Refund

Balance

Pat Bal.

7/29/2023

H2015 Comprehensive Community
Ryan Dingess, CSW

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7/29/2023

H2015 Comprehensive Community
Ryan Dingess, CSW

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7/27/2023

H0038 Peer Support
Ryan Dingess, CSW

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7/27/2023

H2015 Comprehensive Community
Ryan Dingess, CSW

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7/26/2023

H0038 Peer Support
Ryan Dingess, CSW

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7/26/2023

H0038 Peer Support
Karissa Andazola, CSW

90.00

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7/25/2023

H0038 Peer Support
Karissa Andazola, CSW

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7/23/2023

H2015 Comprehensive Community
Joy Leatherman, CPSW

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7/23/2023

H2015 Comprehensive Community
Joy Leatherman, CPSW

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Refresh All From Note

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Manual Post Payments

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Find

Shanti Lazzell

(11/30/1970) #1000010700116

Account ID# 13564444

Additional Patient Information

Chart Face

Demographics

Make Appoi

Account Activity

Statements

Patient Information

Notes

Claims

Account Summary

Viewing Options

☒ All Charges ☐ Charges with Balances

The option for default service charge responsibility has been moved to the group level settings and directories, in the account tab.

New Service Charge

Collect Pre-Payment

	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	
Totals:	\$3,958.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$3,958.96	
Patient:		0.00	0.00	0.00	0.00	0.00		0.00	0.00	\$0.00	A
Insurance:		0.00	0.00		0.00		0.00			\$3,958.96	Not A

Account Detail	Charge	Paid	Adjust.	Credit	Write-Off	Bad Debt	Recoup	Fee	Refund	Balance	Pat Bal.
7/15/2023 H0038 Peer Support Joy Leatherman, CPSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/15/2023 H2015 Comprehensive Community Joy Leatherman, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/11/2023 H2015 Comprehensive Community Joy Leatherman, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/10/2023 H2015 Comprehensive Community Joy Leatherman, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/9/2023 H0038 Peer Support Joy Leatherman, CPSW	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$30.00	\$0.00
7/9/2023 H2015 Comprehensive Community Joy Leatherman, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/8/2023 H2015 Comprehensive Community Joy Leatherman, CPSW	39.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$39.32	\$0.00
7/8/2023 H2015 Comprehensive Community Joy Leatherman, CPSW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00
7/7/2023 H2015 Comprehensive Community Joy Leatherman, CPSW	39.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$39.32	\$0.00

Refresh All From Note

Add Late Fee

Therapy Groups

Make Appoi

Claims

Add Late Fee

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SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947
Lazzell, Shanti
ID: 1000010700116 DOB: 11/30/1970
Progress Note (Non-Rx) (SOS)

Use Note Creation Time

Clear Time

Set Date/Time

5/18/2023
7:54 PM

Presenting Problem: Paranoid schizophrenia, anxiety, depression, substance abuse.

Recent History: Client has a history of chronic homelessness, unemployment, substance abuse, paranoid schizophrenia, anxiety, and depression.

Intervention: Client was assisted with her night time medications today.

Assessment: Client was appreciative and responded well to the intervention.

Plan: Continue assisting client as needed.

SUICIDE/VIOLENCE RISK ASSESSMENT:

History of Risk Factors:

- *History of Alcohol or Substance Abuse
- *History of Mental Illness:
 - Carries a Diagnosis of Manic Depressive Illness
 - Carries a Diagnosis of Schizophrenia
 - History of Severe Anxiety or Panic Attacks

Current Risk Factors:

- *Experiencing Severe Anxiety or Panic
- *Experiencing Severe Anxiety or Panic
- *A Major Depression is Present
- *Carries a Diagnosis of Schizophrenia
- *Severe Financial Difficulty

Service Location: SOS

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Make Referral

Create Clinical Summary

Create Discharge Summary

Go to Therapy Groups

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1 of 1

7/30/23, 7:17 PM

SOS
610 N. Silver St
Silver City, NM 88061

575-956-6131
575-956-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970

Progress Note (Non-Rx) (SOS)

Use Note Creation Time

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Set Date/Time

5/18/2023
7:54 PM

*Severe Financial Difficulty
*Severe Financial Difficulty

Suicide Risk Assessment:
Ms. Lazzell denies suicidal ideas or intentions.

MEDICAL HISTORY:

Compliance:
Ms. Lazzell reports good compliance with medical instructions including medication orders.

Current Medical Diagnoses:
Dental and Oral:
 *Periodontal Disease. Missing several teeth.
Dermatologic:
 *Skin Tumors: reports having abcess on back of head.
Neurological:
 *Parkinson's Disease: diagnosed within last 7 years.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Paranoid schizophrenia, F20.0 (ICD-10) (Active)
Sheltered homelessness, Z59.01 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

LEVEL OF CARE JUSTIFICATION:
 Ms. Lazzell continues to need outpatient treatment. She continues to exhibit symptoms of an emotional disorder that interfere with day to day functioning and requires continued treatment.

NOTES & RISK FACTORS:

History of suicidal attempts
 Has been self injurious
 History of substance abuse

1 Unit for H0038 Peer Support - UH

Service Location: Tur

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Silver City, NM 88061

575-956-6131
575-956-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970
Progress Note (Non-Rx) (SOS)

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Set Date/Time

5/18/2023

7:54 PM

orders.

Current Medical Diagnoses:

Dental and Oral:
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*Skin Tumors: reports having abcess on back of head.

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*Parkinson's Disease: diagnosed within last 7 years.

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Sheltered homelessness, Z59.01 (ICD-10) (Active)

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NOTES & RISK FACTORS:

History of suicidal attempts
Has been self injurious
History of substance abuse

1 Unit for H0038 Peer Support - UH

Time spent face to face counseling patient and/or family: 15 min

Session start: 7:30 PM
Session end: 7:45 PM

T.Y.
Amber Brandt, CPSW

Electronically Signed
Amber Brandt, CPSW

Service Location: Turn

Audit Log

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Show Notes in List

+ New Note

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970

Use Note Creation Time

Clear Time

Set Date/Time

5/18/2023
6:14 PM

Progress Note (Non-Rx) (SOS)

Presenting Problems:
Substance abuse, psychotic behaviors, unable to control emotions or moods.

Recent History:
Recently Shanti has become very elevated in moods, and demeanor. She is unable to cope with her hallucinations, medication has not been taken in the last two weeks. Shanti is impaired in the functional domains of independent and community living, socializing, and recreation.

Interventions:
Attempted to calm the client by validating her episodes of delusions and hallucinations. Assessed why client was refusing her medications. Labeled her emotions of paranoia and tried reasoning with her as to why she was feeling paranoid. Encouraged client to seek medical attention, she has declined.

Assessment:
Shanti is not doing well today, it is apparent she is having a psychotic episode. Client is met with due to her involuntary convulsions and grunting. Shanti states she is under electrical attack on her nervous system. Client refuses medical attention, she states she is under attack from the leeches within the shelter and is going to be needing a ride to the store for medicine. Client reports she is not taking medications as prescribed due to staff trying to poison her. Client is encouraged to speak with staff if she feels as her emotions are not controlled and she is near harming herself or someone else. She has agreed to these terms. Shanti will be closely monitored for the remainder of the week.

Audit Log

Service Location: SOS

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Create Discharge Summ

Go to Therapy Groups

Change Note Title

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5/21/2023 6:15 PM

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and Lock this Note

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1 of 1

7/30/23, 7:19 PM

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Behavioral Health EHR

Chart Room

Chart Face

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Show Notes in List

SOS
610 N. Silver St
Silver City, NM 88061

575-958-6131
575-958-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970

Progress Note (Non-Rx) (SOS)

5/18/2023
6:14 PM

Use Note Creation Time

Clear Time

Set Date/Time

Service Location

Turn

Audit Log

Copy contents of the text only into
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Print

Print Preview

Suicide Risk Assessment:
She denies suicidal ideas or intentions.

Suicide Risk:
Based on the absence of risk factors, Ms. Lazzell's current risk of suicide is considered Very Low or Absent. There are no suicidal ideation or self-destructive or aggressive thoughts or actions.

Violence Risk:
Based on the risk factors reviewed, Ms. Lazzell's current risk of violence is considered Absent or Very Low. There is no homicidal ideation or intention. No aggressive ideation, self-injurious intentions, or ideation within the past six months prior to this instance of treatment.

Access to Lethal Means:
Access to lethal means was discussed with Ms. Lazzell. She denies having access to lethal means at this time.

MEDICAL HISTORY:

Compliance:
Ms. Lazzell reports good compliance with medical instructions including medication orders.

Current Medical Diagnoses:

Dental and Oral:
*Periodontal Disease. Missing several teeth.

Dermatologic:
*Skin Tumors: reports having abscess on back of head.

Neurological:
*Parkinson's Disease: diagnosed within last 7 years.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Paranoid schizophrenia, F20.0 (ICD-10) (Active)

Sheltered homelessness, Z59.01 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

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Capture Signature

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Capture Signature

#2 Signed By:

Capture Signature

#3 Signed By:

1 of 1

7/30/23, 7:21 PM

Sign Out Edit View Format Reports Chat/Help




Chart Room

Chart Face

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Show Notes in List

SOS

610 N. Silver St

Silver City, NM 88061

575-958-6131

575-958-6947

Lazzell, Shanti

ID: 1000010700116 DOB: 11/30/1970

Use Note Creation Time

Clear Time

Set Date/Time

5/18/2023

6:14 PM

Service Location

Turn

Audit Log

Copy contents of the text only into

Copy complete note into

Print

Print Preview

Dental and Oral:

*Periodontal Disease. Missing several teeth.

Dermatologic:

*Skin Tumors: reports having abscess on back of head.

Neurological:

*Parkinson's Disease: diagnosed within last 7 years.

DIAGNOSES: The following Diagnoses are based on currently available information and may change as additional information becomes available.

Paranoid schizophrenia, F20.0 (ICD-10) (Active)

Sheltered homelessness, Z59.01 (ICD-10) (Active)

INSTRUCTIONS / RECOMMENDATIONS / PLAN:

LEVEL OF CARE JUSTIFICATION: Ms. Lazzell needs continued inpatient treatment. Ms. Lazzell is court ordered, involuntary, committed. She is severely functionally impaired due to psychotic symptoms and she is unable to alleviate these symptoms on her own. and requires continued treatment.

Ms. Lazzell continues to need outpatient treatment. She continues to exhibit symptoms of an emotional disorder that interfere with day to day functioning and requires continued treatment.

NOTES & RISK FACTORS:

History of suicidal attempts

Has been self injurious

History of substance abuse

90837 Psychotherapy 60 min.

Time spent face to face counseling patient and/or family: 60 min

Session start: 4:00 PM

Session end: 5:00 PM

Daniella Ramirez, CPSW

Electronically Signed

Dr. Daniella Ramirez, CPSW

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1 of 1

7/30/23, 7:21 PM

7/30/23, 7:40 PM

Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 9/1/2022SiteX

Service Date EndX 7/30/2023ClinicianX

Payment Date StartXPmt SourceX Patient Insurance

Payment Date EndXBilling CodeX

Posted Date StartXPmt/Adj CodeX

Posted Date EndXBalance TypeX Patient Insurance

Self Pay

Bill Insurance

Manually Posted

Auto Post Payments

Outstanding Balance

Credit Balance

X Clear Filters1096 matching transactions found.

Show Insurance/Patient Balances

Show SitesXShow PatientsXShow CliniciansXShow Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Grado, Antonio	125.00								
SRVC: 5/15/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Griego, Jr., Leroy	250.00								
SRVC: 4/19/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 4/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Meraz, Esmerelda	125.00								
SRVC: 5/16/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Murillo, Angelica	625.00								
SRVC: 4/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 5/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 5/19/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 5/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/2/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Myers, Joseph	125.00								
SRVC: 4/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Scott, Lorea	125.00								
SRVC: 5/16/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Sierra, Erik	125.00								
SRVC: 5/16/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Snyder, Colton C	375.00								
SRVC: 4/19/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 4/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 4/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Wood, Russell	125.00								
SRVC: 5/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Yniguez, Thomas J	125.00								
SRVC: 5/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Michelle Grayless, MSW	895.00								
Alvarado, Christeena									
SRVC: 2/16/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Boroski, Deborah A									
SRVC: 4/14/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				

1 of 1

7/30/23, 7:40 PM

Sign Out Edit View Format Reports Chat/Help

Patient Account	Batch Statements	Reports	Auto Post Payments	Manual Post Payments	Online	
Provider Report	Deposit Report	Payment Report	Collections Report	Patient Aging	Insurance Aging	Com
Service Date Start <input checked="" type="checkbox"/> 9/1/2022	<input checked="" type="checkbox"/> 7/30/2023	Site <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pmt Source <input checked="" type="checkbox"/> <input type="radio"/> Patient <input type="radio"/> Insuran		
Service Date End <input checked="" type="checkbox"/>		Clinician <input checked="" type="checkbox"/>		Billing Code <input checked="" type="checkbox"/>		
Payment Date Start <input checked="" type="checkbox"/>		Insurance <input checked="" type="checkbox"/>		Pmt/Adj Code <input checked="" type="checkbox"/>		
Payment Date End <input checked="" type="checkbox"/>		Patient <input checked="" type="checkbox"/>		Balance Type <input checked="" type="checkbox"/> <input type="checkbox"/> Patient <input type="checkbox"/> Insuran		
Posted Date Start <input checked="" type="checkbox"/>				<input type="radio"/> Self Pay <input type="radio"/> Bill Insurance		
Posted Date End <input checked="" type="checkbox"/>				<input type="radio"/> Manually Posted <input type="radio"/> Auto Post Payments	<input type="radio"/> Outstanding Balance <input type="radio"/> Credit Balance	
<input checked="" type="checkbox"/> Clear Filters	1096 matching transactions found.	Show Insurance/ Patient Balances <input type="checkbox"/>	Show Sites <input checked="" type="checkbox"/> Show Patients <input checked="" type="checkbox"/> Show Clinicians <input checked="" type="checkbox"/> Show Insurance <input type="checkbox"/>	Detail	Summa	

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 2/16/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Boroski, Deborah A									
SRVC: 11/15/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Boston, Judith									
SRVC: 2/9/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Bounds, Keith	145.00								
SRVC: 12/13/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/9/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/13/2022	145.00	0.00	0.00	BAL DUE: \$145.00	90837 Psychotherapy 60 Min.				
Bracamontes, Raquel F	125.00								
SRVC: 12/30/2022	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Cabrera, Micaela G									
SRVC: 2/14/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Carbajal, Ronnie J									
SRVC: 11/29/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Clay, Scott A									
SRVC: 2/10/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Conyers, Debra									
SRVC: 2/9/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Dingess, Ryan C									
SRVC: 2/10/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Gomez, Lisa R									
SRVC: 2/10/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Gonzales, Monique									
SRVC: 2/7/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Grinstead, Marque									
SRVC: 2/13/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Grinstead, Rosemary									
SRVC: 2/13/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Guenther, Julie									
SRVC: 2/10/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Hughes, M A									
SRVC: 2/10/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				

7/30/23, 7:45 PM

7/30/23, 7:46 PM

7/30/23, 7:47 PM

7/30/23, 7:48 PM

7/30/23, 7:48 PM

7/30/23, 7:48 PM

Sign Out Edit View Format Reports Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online I

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Coml

Service Date Start ☒ 9/1/2022 Site ☒

Service Date End ☒ 7/30/2023 Clinician ☒

Payment Date Start ☒ Insurance ☒

Payment Date End ☒ Patient ☒

Posted Date Start ☒

Posted Date End ☒

☐ Self Pay
☐ Bill Insurance

☐ Manually Posted
☐ Auto Post Payments

☐ Outstanding Balance
☐ Credit Balance

Pmt Source ☒ ☐ Patient ☐ Insuran

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒ ☐ Patient ☐ Insuran

☒ Clear Filters

1096 matching transactions found.

Show Insurance/
Patient Balances ☐

Show Sites ☒ Show Patients ☒
Show Clinicians ☒ Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
⊕ Aguilar, Ivan									
⊕ SRVC: 12/29/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ Allensworth, Maxine	125.00								
⊕ SRVC: 2/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ Alviso, Anthony R									
⊕ SRVC: 12/15/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 12/27/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ Avelar, Michael	250.00								
⊕ SRVC: 2/15/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 3/1/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 3/8/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ Bailey, Thomas	250.00								
⊕ SRVC: 3/15/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 3/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ Baker, Nathan									
⊕ SRVC: 12/30/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ Bautista, Oscar	125.00								
⊕ SRVC: 3/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ Brannan, Billy O									
⊕ SRVC: 9/20/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 9/27/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 10/4/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 10/11/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 11/15/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 11/22/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 11/29/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 12/6/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 12/13/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 12/27/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 1/31/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 1/17/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 1/24/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psvchotherapy 60 Min.				

Sign Out
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Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online I

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Coml

Service Date Start

Service Date End

Payment Date Start

Payment Date End

Posted Date Start

Posted Date End

9/1/2022

7/30/2023

Site

Clinician

Insurance

Patient

Pmt Source

Billing Code

Pmt/Adj Code

Balance Type

☐ Patient
☐ Insurance

☐ Self Pay
☐ Bill Insurance

☐ Manually Posted
☐ Auto Post Payments

☐ Outstanding Balance
☐ Credit Balance

X Clear Filters

1096 matching transactions found.

Show Insurance/Patient Balances

Show Sites

Show Patients

Show Clinicians

Show Insurance

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 1/17/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/24/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/10/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/7/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Brewer, Molynda	125.00								
SRVC: 10/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/13/2022	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Calderon, Belinda	125.00								
SRVC: 12/6/2022	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Carbajal, Ronnie J									
SRVC: 9/13/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 9/27/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 10/4/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 10/18/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/6/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/13/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/27/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/3/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/7/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/17/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/14/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Cardona, John J	250.00								
SRVC: 3/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Castor, John									
SRVC: 9/20/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Chavez, Florence G									
SRVC: 12/20/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/29/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Clay, Scott A	125.00								
SRVC: 3/1/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				

Sign Out
Edit
View
Format
Reports
Chat/Help

Patient Account
Batch Statements
Reports
Auto Post Payments
Manual Post Payments
Online I

Provider Report
Deposit Report
Payment Report
Collections Report
Patient Aging
Insurance Aging
Coml

Service Date Start
X
9/1/2022

Service Date End
X
7/30/2023

Payment Date Start
X

Payment Date End
X

Posted Date Start
X

Posted Date End
X

Site
X

Clinician
X

Insurance
X

Patient
X

Pmt Source
X
Patient
Insurance

Billing Code
X

Pmt/Adj Code
X

Balance Type
X
Patient
Insurance

Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

X
Clear Filters
1096 matching transactions found.

Show Insurance/Patient Balances

Show Sites
Show Patients
Show Clinicians
Show Insurance

Detail
Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Clemens, Angel									
SRVC: 10/26/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Cyrus, Sarah 250.00									
SRVC: 3/1/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 12/13/2022	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Dean, Freddie 125.00									
SRVC: 1/4/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 3/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Dominguez, Ernesto 125.00									
SRVC: 9/5/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 9/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 9/26/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 11/14/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 3/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Dominguez, Ernesto S.									
SRVC: 9/2/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Dominguez, Feliciana 125.00									
SRVC: 12/13/2022	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Dominguez, Joseph									
SRVC: 9/8/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/1/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/29/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/5/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Edwards, Carl									
SRVC: 11/15/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Ellingwood, Daniel									
SRVC: 10/1/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 11/16/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/28/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/7/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/4/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Fiorentino, Charles 875.00									

1 of 1

7/30/23, 7:50 PM

Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 9/1/2022SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX
Billing CodeX
Pmt/Adj CodeX
Balance TypeX

☐ Patient ☐ Insurance
☐ Self Pay ☐ Bill Insurance
☐ Manually Posted ☐ Outstanding Balance
☐ Auto Post Payments ☐ Credit Balance

X Clear Filters1096 matching transactions found.

Show Insurance/
Patient Balances☐

Show Sites☒ Show Patients☒
Show Clinicians☒ Show Insurance☐

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
⦿ Fiorentino, Charles	875.00								
⦿ SRVC: 9/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 9/19/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 9/26/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 10/3/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 10/7/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 10/10/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 10/17/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 10/31/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 11/14/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 11/28/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 12/5/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 12/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 12/26/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 1/2/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 1/9/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 2/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 3/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 3/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 4/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 4/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⦿ Flores, Lucas	250.00								
⦿ SRVC: 10/5/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 10/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 3/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 3/29/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⦿ Fox, Kevin M	250.00								
⦿ SRVC: 2/14/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⦿ SRVC: 2/23/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⦿ Freddy, Maestas A	125.00								
⦿ SRVC: 4/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 9/1/2022SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPmt SourceX Patient Insurance
Payment Date EndXBilling CodeX
Posted Date StartXPmt/Adj CodeX
Posted Date EndXBalance TypeX Patient Insurance

Self Pay
Bill Insurance

Manually Posted
Auto Post Payments

Outstanding Balance
Credit Balance

X Clear Filters1096 matching transactions found.

Show Insurance/
Patient Balances

Show SitesXShow PatientsX
Show CliniciansXShow Insurance

DetailSumma

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
⊕ Gomez, Gilbert	125.00								
⊕ SRVC: 12/13/2022	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 1/23/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ Gonzales, Diana									
⊕ SRVC: 11/4/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ Gonzales, Lupe	1,250.00								
⊕ SRVC: 9/5/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 9/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 9/19/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 9/26/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 10/3/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 10/10/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 10/17/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 10/24/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 10/31/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 11/14/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 11/7/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 11/28/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 12/5/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 12/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 12/26/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 1/2/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 1/9/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 1/16/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 1/23/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 1/30/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 2/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 2/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 3/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 3/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊕ SRVC: 2/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 9/1/2022SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPmt SourceX Patient Insurance
Payment Date EndXBilling CodeX
Posted Date StartXPmt/Adj CodeX
Posted Date EndXBalance TypeX Patient Insurance
Manually PostedOutstanding Balance
Auto Post PaymentsCredit Balance

X Clear Filters1096 matching transactions found.

Show Insurance/
Patient Balances

Show SitesXShow PatientsX
Show CliniciansXShow Insurance

DetailSumma

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 1/16/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 3/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 2/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Graham, Isaac									
SRVC: 11/16/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Gray, Brenda L									
SRVC: 10/1/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Griego, Jr., Leroy	125.00								
SRVC: 3/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Guenther, Julie	125.00								
SRVC: 3/31/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Haley, Shelly									
SRVC: 9/2/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 9/13/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 9/20/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 9/27/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 10/11/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 10/25/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 11/29/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 11/22/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 11/15/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/6/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/13/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/27/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/5/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/31/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/14/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Hampton, Jessie									
SRVC: 10/26/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Hartsfield, Christopher									
SRVC: 2/8/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				

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Patient Account	Batch Statements	Reports	Auto Post Payments	Manual Post Payments	Online						
Provider Report	Deposit Report	Payment Report	Collections Report	Patient Aging	Insurance Aging						
Service Date Start <input checked="" type="checkbox"/> 9/1/2022 Service Date End <input checked="" type="checkbox"/> 7/30/2023 Payment Date Start <input checked="" type="checkbox"/> Payment Date End <input checked="" type="checkbox"/> Posted Date Start <input checked="" type="checkbox"/> Posted Date End <input checked="" type="checkbox"/>	Site <input checked="" type="checkbox"/> Clinician <input checked="" type="checkbox"/> Insurance <input checked="" type="checkbox"/> Patient <input checked="" type="checkbox"/>	Pmt Source <input checked="" type="checkbox"/> Patient <input type="checkbox"/> Insurance Billing Code <input checked="" type="checkbox"/> Pmt/Adj Code <input checked="" type="checkbox"/> Balance Type <input checked="" type="checkbox"/> Patient <input type="checkbox"/> Insurance <input type="radio"/> Self Pay <input type="radio"/> Bill Insurance <input type="radio"/> Manually Posted <input type="radio"/> Outstanding Balance <input type="radio"/> Auto Post Payments <input type="radio"/> Credit Balance	<input checked="" type="checkbox"/> Clear Filters 1096 matching transactions found. Show Insurance/Patient Balances <input type="checkbox"/> Show Sites <input checked="" type="checkbox"/> Show Patients <input checked="" type="checkbox"/> Show Clinicians <input checked="" type="checkbox"/> Show Insurance <input type="checkbox"/> Detail Summary								
		Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt	
SRVC: 3/11/2023		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
SRVC: 2/24/2023		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
Michel, Toby		125.00									
SRVC: 9/19/2022			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 2/6/2023			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 12/13/2022		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
Miranda, Sergio		125.00									
SRVC: 12/14/2022			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 12/19/2022			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 2/14/2023		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
Mudry, Crystal											
SRVC: 11/11/2022			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 11/11/2022			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
Munoz, Casey		250.00									
SRVC: 3/7/2023		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
SRVC: 3/17/2023		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
Murillo, Angelica		750.00									
SRVC: 10/17/2022			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 10/31/2022			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 11/26/2022		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
SRVC: 12/2/2022		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
SRVC: 12/16/2022		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
SRVC: 12/28/2022			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 1/10/2023		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
SRVC: 11/10/2022		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
SRVC: 12/28/2022		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					
Myers, Joseph		625.00									
SRVC: 10/1/2022			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 10/12/2022			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 10/26/2022			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 1/2/2023			0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.					
SRVC: 1/9/2023		125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.					

Sign Out Edit View Format Reports Chat/Help

Patient Account	Batch Statements	Reports	Auto Post Payments	Manual Post Payments	Online	
Provider Report	Deposit Report	Payment Report	Collections Report	Patient Aging	Insurance Aging	Com
Service Date Start <input checked="" type="checkbox"/> 9/1/2022	<input checked="" type="checkbox"/> 7/30/2023	Site <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pmt Source <input checked="" type="checkbox"/> <input type="radio"/> Patient <input type="radio"/> Insuran		
Service Date End <input checked="" type="checkbox"/>	Clinician <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Billing Code <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Payment Date Start <input checked="" type="checkbox"/>	Insurance <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pmt/Adj Code <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Payment Date End <input checked="" type="checkbox"/>	Patient <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Balance Type <input checked="" type="checkbox"/> <input type="checkbox"/> Patient <input type="checkbox"/> Insuran			
Posted Date Start <input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="radio"/> Self Pay <input type="radio"/> Bill Insurance	<input type="radio"/> Manually Posted <input type="radio"/> Outstanding Balance		
Posted Date End <input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="radio"/> Auto Post Payments	<input type="radio"/> Credit Balance		
<input checked="" type="checkbox"/> Clear Filters	1096 matching transactions found.	Show Insurance/ Patient Balances <input type="checkbox"/>	Show Sites <input checked="" type="checkbox"/> Show Patients <input checked="" type="checkbox"/> Show Clinicians <input checked="" type="checkbox"/> Show Insurance <input type="checkbox"/>	Detail	Summa	

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Myers, Joseph	625.00								
SRVC: 10/1/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 10/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 10/26/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/2/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/9/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 1/16/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 2/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 2/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 1/30/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Orionis, Rigel									
SRVC: 12/14/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Padilla, Leo	125.00								
SRVC: 2/23/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Perry, Marcella L									
SRVC: 11/21/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 11/25/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 9/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 9/26/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Porras, Jose									
SRVC: 12/19/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/23/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/24/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Proudlock, Johnathon									
SRVC: 10/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 10/27/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Provencio, Sue Ellen									
SRVC: 12/8/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/23/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Quinn, Robert	125.00								
SRVC: 2/2/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date Start ☒ 9/1/2022 Site ☒
Service Date End ☒ 7/30/2023 Clinician ☒
Payment Date Start ☒
Payment Date End ☒
Posted Date Start ☒
Posted Date End ☒

☒ Self Pay ☐ Bill Insurance
☐ Manually Posted ☐ Auto Post Payments
☐ Outstanding Balance ☐ Credit Balance

Pmt Source ☒ ☐ Patient ☐ Insuran
Billing Code ☒
Pmt/Adj Code ☒
Balance Type ☒ ☐ Patient ☐ Insuran

☒ Clear Filters1096 matching transactions found.

Show Insurance/
Patient Balances ☐

Show Sites ☒ Show Patients ☒
Show Clinicians ☒ Show Insurance ☐

DetailSumma

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
<input checked="" type="radio"/> SRVC: 2/14/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> Simmons, Jennifer									
<input checked="" type="radio"/> SRVC: 9/13/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 9/20/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 10/4/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 11/15/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 10/25/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> Snyder, Colton C	750.00								
<input checked="" type="radio"/> SRVC: 11/16/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 3/1/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 1/18/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 3/2/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 3/8/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 3/22/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 2/15/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> Sotelo, Maria									
<input checked="" type="radio"/> SRVC: 9/8/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 9/27/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 10/4/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 10/25/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 12/6/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 12/13/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 12/27/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 1/10/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 2/7/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> Taliferro, Miya	250.00								
<input checked="" type="radio"/> SRVC: 1/6/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 1/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 1/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> Titus, Otto									
<input checked="" type="radio"/> SRVC: 10/5/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
<input checked="" type="radio"/> SRVC: 11/20/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 9/1/2022SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPmt SourceX Patient Insurance
Payment Date EndXBilling CodeX
Posted Date StartXPmt/Adj CodeX
Posted Date EndXBalance TypeX Patient Insurance
Manually PostedOutstanding Balance
Auto Post PaymentsCredit Balance

X Clear Filters1096 matching transactions found.

Show Insurance/
Patient Balances

Show SitesXShow PatientsX
Show CliniciansXShow Insurance

DetailSumma

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
White, Michael	625.00								
SRVC: 1/3/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/9/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/10/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/18/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/27/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/30/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/31/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/2/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/8/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 2/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 3/7/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 3/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 3/14/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Will, John	125.00								
SRVC: 3/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Willis, Cassandra	375.00								
SRVC: 1/3/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/5/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/17/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/23/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/27/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/30/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/3/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/8/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/10/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 3/7/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 2/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Wood, Russell	375.00								

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingCom

Service Date StartX 9/1/2022SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPmt SourceX Patient Insurance
Payment Date EndXBilling CodeX
Posted Date StartXPmt/Adj CodeX
Posted Date EndXBalance TypeX Patient Insurance

Self Pay
Bill Insurance

Manually Posted
Auto Post Payments

Outstanding Balance
Credit Balance

X Clear Filters1096 matching transactions found.

Show Insurance/
Patient Balances

Show SitesXShow PatientsX
Show CliniciansXShow Insurance

DetailSumma

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
⊙ Aguilar, Ivan	125.00								
⊙ SRVC: 5/8/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ Chavez, Armando	125.00								
⊙ SRVC: 4/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ Cyrus, Sarah	125.00								
⊙ SRVC: 4/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ Dean, Freddie	625.00								
⊙ SRVC: 5/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ SRVC: 6/26/2023	500.00	0.00	0.00	BAL DUE: \$500.00	90837 Psychotherapy 60 Min.				
⊙ Freddy, Maestas A	125.00								
⊙ SRVC: 2/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ Gooden, Kelvin D	125.00								
⊙ SRVC: 5/9/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ Hartsfield, Christopher	125.00								
⊙ SRVC: 4/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ Hernandez, Amanda	250.00								
⊙ SRVC: 2/23/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ SRVC: 4/25/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ Johnson, Prentis	125.00								
⊙ SRVC: 4/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ Juarez, Anna M	125.00								
⊙ SRVC: 2/22/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ Lamb, Candace	125.00								
⊙ SRVC: 4/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ Lazzell, Shanti	750.00								
⊙ SRVC: 4/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ SRVC: 4/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ SRVC: 5/1/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ SRVC: 5/2/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ SRVC: 5/8/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ SRVC: 5/18/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
⊙ McAllister, Mark	125.00								

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 9/1/2022SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPmt SourceX Patient Insurance
Payment Date EndXBilling CodeX
Posted Date StartXPmt/Adj CodeX
Posted Date EndXBalance TypeX Patient Insurance
Manually Posted Outstanding Balance
Auto Post PaymentsCredit Balance

Self PayBill Insurance

Show SitesXShow PatientsXShow CliniciansXShow Insurance

DetailSummary

X Clear Filters1096 matching transactions found.

Show Insurance/Patient Balances

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
McAllister, Mark	125.00								
SRVC: 4/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Miranda, Sergio	125.00								
SRVC: 4/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Mudry, Crystal	375.00								
SRVC: 4/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 4/19/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 4/25/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Padilla, Juan	125.00								
SRVC: 5/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Quinn, Robert	645.00								
SRVC: 4/19/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 4/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 5/1/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 5/2/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90837 Psychotherapy 60 Min.				
SRVC: 5/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ramirez, Juan	125.00								
SRVC: 4/14/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ramos, Javier	125.00								
SRVC: 4/14/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Rodriguez, Melissa	125.00								
SRVC: 5/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Sanders, Crystal	250.00								
SRVC: 4/28/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 5/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Taliferro, Miya	125.00								
SRVC: 4/25/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Theis, Sabrina	125.00								
SRVC: 5/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Tilman, Andrew	125.00								
SRVC: 2/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Vigil, Jesus	250.00								

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 9/1/2022SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX Patient Insurance
Billing CodeX
Pmt/Adj CodeX
Balance TypeX Patient Insurance
Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

Self Pay
Bill Insurance

X Clear Filters1096 matching transactions found.

Show Insurance/
Patient Balances

Show SitesX
Show CliniciansX

Show PatientsX
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
White, Michael	125.00								
SRVC: 3/8/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Lawren Davenport, CPSW	1,125.00								
Gooden, Kelvin D	125.00								
SRVC: 3/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Johnson, Prentis	125.00								
SRVC: 3/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Lam, Amy	125.00								
SRVC: 3/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Lemoyne, Hal G	125.00								
SRVC: 3/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Lopez, Henry	125.00								
SRVC: 3/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Munoz, Casey	125.00								
SRVC: 3/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Peters, Eric	125.00								
SRVC: 3/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Torres, Rafael	125.00								
SRVC: 2/23/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
White, Michael	125.00								
SRVC: 3/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Michelle Grayless, MSW	250.00								
Calderon, Belinda	125.00								
SRVC: 12/13/2022	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Corica, Cecilia M	125.00								
SRVC: 12/13/2022	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Martinez, Marissa									
SRVC: 2/24/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Tomas Sandoval, CPSW	520.00								
Baker, Nathan	125.00								
SRVC: 3/31/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Chavez, Armando	125.00								

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 9/1/2022SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX Patient Insurance
Billing CodeX
Pmt/Adj CodeX
Balance TypeX Patient Insurance
Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

Self Pay
Bill Insurance

X Clear Filters1096 matching transactions found.

Show Insurance/
Patient Balances

Show SitesX Show PatientsX
Show CliniciansX Show Insurance

DetailSumma

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
👤 Leyba, Madonna	1,000.00								
👤 SRVC: 2/10/2023	500.00	0.00	0.00	BAL DUE: \$500.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 2/16/2023	500.00	0.00	0.00	BAL DUE: \$500.00	90837 Psychotherapy 60 Min.				
👤 Lopez, Henry									
👤 SRVC: 12/6/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 Ludwig, Edward	500.00								
👤 SRVC: 3/6/2023	500.00	0.00	0.00	BAL DUE: \$500.00	90837 Psychotherapy 60 Min.				
👤 Matthews, Richard									
👤 SRVC: 1/19/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 Meraz, Esmerelda	500.00								
👤 SRVC: 12/9/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 12/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 1/3/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 1/4/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 1/11/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 1/13/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 2/27/2023	500.00	0.00	0.00	BAL DUE: \$500.00	90837 Psychotherapy 60 Min.				
👤 Myers, Joseph	125.00								
👤 SRVC: 1/23/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👤 Peters, Eric									
👤 SRVC: 1/23/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 Provencio, Sue Ellen									
👤 SRVC: 12/5/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 12/6/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 Quinn, Robert	3,000.00								
👤 SRVC: 11/28/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 12/5/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 12/9/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 12/13/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 12/30/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 1/3/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
👤 SRVC: 1/6/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				

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Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingCom

Service Date StartX 9/1/2022SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPmt SourceX Patient Insurance
Payment Date EndXBilling CodeX
Posted Date StartXPmt/Adj CodeX
Posted Date EndXBalance TypeX Patient Insurance
Manually Posted Outstanding Balance
Auto Post Payments Credit Balance

Self Pay
Bill Insurance

Manually Posted
Auto Post Payments

Outstanding Balance
Credit Balance

X Clear Filters1096 matching transactions found.

Show Insurance/
Patient Balances

Show SitesXShow PatientsX
Show CliniciansXShow Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Vannatter, Nathaniel									
SRVC: 12/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Vannatter, Nicole S1,000.00									
SRVC: 1/13/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/30/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/2/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/6/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/24/2023	500.00	0.00	0.00	BAL DUE: \$500.00	90837 Psychotherapy 60 Min.				
SRVC: 2/27/2023	500.00	0.00	0.00	BAL DUE: \$500.00	90837 Psychotherapy 60 Min.				
Varela, Robert									
SRVC: 1/3/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Vigil, Jesus1,000.00									
SRVC: 12/9/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/13/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 2/10/2023	500.00	0.00	0.00	BAL DUE: \$500.00	90837 Psychotherapy 60 Min.				
SRVC: 2/20/2023	500.00	0.00	0.00	BAL DUE: \$500.00	90837 Psychotherapy 60 Min.				
Walker, Trevor									
SRVC: 1/25/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
White, Kayla									
SRVC: 12/5/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/12/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Willis, Cassandra625.00									
SRVC: 12/15/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/16/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/27/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 12/28/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/4/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/5/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/9/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/12/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/13/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 1/14/2023		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				

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Sign Out Edit View Format Reports Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Com

Service Date Start ☒ 9/1/2022

Service Date End ☒ 7/30/2023

Payment Date Start ☒

Payment Date End ☒

Posted Date Start ☒

Posted Date End ☒

Site ☒

Clinician ☒

Insurance ☒

Patient ☒

☐ Self Pay
☐ Bill Insurance

Pmt Source ☒ ☐ Patient ☐ Insuran

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒ ☐ Patient ☐ Insuran

☐ Manually Posted ☐ Outstanding Balance
☐ Auto Post Payments ☐ Credit Balance

☒ Clear Filters

1096 matching transactions found.

Show Insurance/
Patient Balances ☐

Show Sites ☒ Show Patients ☒
Show Clinicians ☒ Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 4/2/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90837	Psychotherapy 60 Min.			
Hernandez, Amanda	145.00								
SRVC: 4/2/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90837	Psychotherapy 60 Min.			
Lam, Amy	125.00								
SRVC: 4/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
Lopez, Henry	125.00								
SRVC: 4/4/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
Perez, Christopher	145.00								
SRVC: 4/2/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90837	Psychotherapy 60 Min.			
Sierra, Alexander	125.00								
SRVC: 3/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
Vannatter, Nicole S	125.00								
SRVC: 3/22/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
Jesse Berkowitz, LMSW	1,000.00								
Bridges, Josh	250.00								
SRVC: 6/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
SRVC: 7/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
Foster, Dana	375.00								
SRVC: 6/28/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
SRVC: 7/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
Haassman, Jessica	125.00								
SRVC: 5/23/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
Mohr, Lee Ann	250.00								
SRVC: 5/1/2023		0.00	0.00	BAL DUE: \$0.00	90837	Psychotherapy 60 Min.			
SRVC: 5/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
SRVC: 5/25/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
Joy Leatherman, CPSW	1,735.00								
Cardona, John J	250.00								
SRVC: 2/23/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
SRVC: 3/2/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			
Hayes, Christopher	250.00								
SRVC: 3/23/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837	Psychotherapy 60 Min.			

Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 9/1/2022SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX
Billing CodeX
Pmt/Adj CodeX
Balance TypeX

☐ Patient ☐ Insurance
☐ Self Pay ☐ Bill Insurance
☐ Manually Posted ☐ Outstanding Balance
☐ Auto Post Payments ☐ Credit Balance

X Clear Filters1096 matching transactions found.

Show Insurance/
Patient Balances☐

Show Sites☒ Show Patients☒
Show Clinicians☒ Show Insurance☐

DetailSumma

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Cardona, John J	250.00								
SRVC: 2/23/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 3/2/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Hayes, Christopher	250.00								
SRVC: 2/22/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 3/2/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Johnson, Pamela	30.00								
SRVC: 3/1/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90837 Psychotherapy 60 Min.				
Lam, Amy	270.00								
SRVC: 2/15/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90837 Psychotherapy 60 Min.				
SRVC: 3/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ludwig, Edward	250.00								
SRVC: 3/2/2023	250.00	0.00	0.00	BAL DUE: \$250.00	90837 Psychotherapy 60 Min.				
Marquez, James A									
SRVC: 10/20/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Rodriguez, Melissa	145.00								
SRVC: 2/25/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90837 Psychotherapy 60 Min.				
Sierra, Caesar I	125.00								
SRVC: 3/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Torres, Rafael	145.00								
SRVC: 2/8/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90837 Psychotherapy 60 Min.				
Vannatter, Nathaniel	145.00								
SRVC: 2/5/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90837 Psychotherapy 60 Min.				
Vosburg, Melody									
SRVC: 11/21/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Williams, Greg W	125.00								
SRVC: 3/15/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Lawren Davenport, CPSW	375.00								
Quintana, Charisma	125.00								
SRVC: 2/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Tilman, Andrew	125.00								
SRVC: 2/28/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				

1 of 1

7/30/23, 8:02 PM

Sign Out Edit View Format Reports Chat/Help

Patient Account	Batch Statements	Reports	Auto Post Payments	Manual Post Payments	Online I	
Provider Report	Deposit Report	Payment Report	Collections Report	Patient Aging	Insurance Aging	Coml
Service Date Start <input checked="" type="checkbox"/> 9/1/2022	<input checked="" type="checkbox"/> 7/30/2023	Site <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pmt Source <input checked="" type="checkbox"/> Patient <input type="checkbox"/> Insurance		
Service Date End <input checked="" type="checkbox"/>		Clinician <input checked="" type="checkbox"/>		Billing Code <input checked="" type="checkbox"/>		
Payment Date Start <input checked="" type="checkbox"/>		Insurance <input checked="" type="checkbox"/>		Pmt/Adj Code <input checked="" type="checkbox"/>		
Payment Date End <input checked="" type="checkbox"/>		Patient <input checked="" type="checkbox"/>		Balance Type <input checked="" type="checkbox"/> Patient <input type="checkbox"/> Insurance		
Posted Date Start <input checked="" type="checkbox"/>				<input type="radio"/> Self Pay <input type="radio"/> Bill Insurance		
Posted Date End <input checked="" type="checkbox"/>				<input type="radio"/> Manually Posted <input type="radio"/> Auto Post Payments	<input type="radio"/> Outstanding Balance <input type="radio"/> Credit Balance	
<input checked="" type="checkbox"/> Clear Filters	1096 matching transactions found.	Show Insurance/ Patient Balances <input type="checkbox"/>	Show Sites <input checked="" type="checkbox"/> Show Clinicians <input checked="" type="checkbox"/>	Show Patients <input checked="" type="checkbox"/> Show Insurance <input type="checkbox"/>	Detail	Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 2/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Tilman, Andrew	125.00								
SRVC: 2/28/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Torres, Rafael	125.00								
SRVC: 2/16/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Michelle Grayless, MSW	125.00								
Murillo, Angelica									
SRVC: 9/6/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 9/9/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Shoobridge, Daniel	125.00								
SRVC: 9/26/2022	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Women's Transitional Home-	19,875.00								
Christina Wolford, LCSW	125.00								
Ignacio, Patricia T									
SRVC: 12/1/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
SRVC: 9/1/2022		0.00	0.00	BAL DUE: \$0.00	90837 Psychotherapy 60 Min.				
Zumwalt, Amber	125.00								
SRVC: 2/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Joy Leatherman, CPSW	12,500.00								
Aguilar, Ivan	125.00								
SRVC: 4/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Avelar, Michael	375.00								
SRVC: 4/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 5/30/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/5/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Bailey, Thomas	125.00								
SRVC: 5/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Barrett, Robert D	250.00								
SRVC: 5/31/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/14/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Brannan, Billy O	375.00								
SRVC: 4/4/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				

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Sign Out Edit View Format Reports Chat/Help

Patient Account	Batch Statements	Reports	Auto Post Payments	Manual Post Payments	Online			
Provider Report	Deposit Report	Payment Report	Collections Report	Patient Aging	Insurance Aging			
Service Date Start <input checked="" type="checkbox"/> 9/1/2022 Service Date End <input checked="" type="checkbox"/> 7/30/2023 Payment Date Start <input checked="" type="checkbox"/> Payment Date End <input checked="" type="checkbox"/> Posted Date Start <input checked="" type="checkbox"/> Posted Date End <input checked="" type="checkbox"/>	Site <input checked="" type="checkbox"/> Clinician <input checked="" type="checkbox"/> Insurance <input checked="" type="checkbox"/> Patient <input checked="" type="checkbox"/>	Pmt Source <input checked="" type="checkbox"/> Patient <input type="checkbox"/> Insurance Billing Code <input checked="" type="checkbox"/> Pmt/Adj Code <input checked="" type="checkbox"/> Balance Type <input checked="" type="checkbox"/> Patient <input type="checkbox"/> Insurance <input type="radio"/> Self Pay <input type="radio"/> Bill Insurance <input type="radio"/> Manually Posted <input type="radio"/> Outstanding Balance <input type="radio"/> Auto Post Payments <input type="radio"/> Credit Balance	<input checked="" type="checkbox"/> Clear Filters 1096 matching transactions found. Show Insurance/Patient Balances <input type="checkbox"/> Show Sites <input checked="" type="checkbox"/> Show Patients <input checked="" type="checkbox"/> Show Clinicians <input checked="" type="checkbox"/> Show Insurance <input type="checkbox"/> Detail Summary					
Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Flores, Lucas 125.00 SRVC: 3/22/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min.								
Gomez, Frank 125.00 SRVC: 6/8/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min.								
Gonzales, Lupe 1,250.00 SRVC: 4/17/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 4/10/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 5/22/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 5/8/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 5/2/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 4/24/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 5/30/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 6/5/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 4/3/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 3/27/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min.								
Gordon, Sebastion S 250.00 SRVC: 5/3/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 5/30/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min.								
Grado, Antonio 1,125.00 SRVC: 4/3/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 4/10/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 5/22/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 5/8/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 5/2/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 4/17/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 4/24/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 5/30/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 6/5/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min.								
Griego, Jr., Leroy 500.00 SRVC: 4/5/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min. SRVC: 5/10/2023 125.00 0.00 0.00 BAL DUE: \$125.00 90837 Psychotherapy 60 Min.								

Sign Out Edit View Format Reports Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online I

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Coml

Service Date Start ☒ 9/1/2022 Site ☒

Service Date End ☒ 7/30/2023 Clinician ☒

Payment Date Start ☒ Insurance ☒

Payment Date End ☒ Patient ☒

Posted Date Start ☒

Posted Date End ☒

☐ Self Pay
☐ Bill Insurance

☐ Manually Posted
☐ Auto Post Payments

☐ Outstanding Balance
☐ Credit Balance

Pmt Source ☒ ☐ Patient ☐ Insuran

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒ ☐ Patient ☐ Insuran

☒ Clear Filters

1096 matching transactions found.

Show Insurance/
Patient Balances ☐

Show Sites ☒ Show Patients ☒
Show Clinicians ☒ Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 5/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 5/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 5/31/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Juarez, Robert	250.00								
SRVC: 4/4/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/1/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Meraz, Esmerelda	500.00								
SRVC: 4/4/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 4/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 4/18/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Michel, Toby	125.00								
SRVC: 4/18/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Myers, Joseph	250.00								
SRVC: 4/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 5/30/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Proudlock, Johnathon	375.00								
SRVC: 5/22/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 4/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 5/30/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ramirez, Juan	625.00								
SRVC: 4/4/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 4/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 4/25/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Rivera, Matias	250.00								
SRVC: 5/16/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 3/14/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Romero, Caesar	250.00								
SRVC: 5/30/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				

Sign Out Edit View Format Reports Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Com

Service Date Start ☒ 9/1/2022

Service Date End ☒ 7/30/2023

Payment Date Start ☒

Payment Date End ☒

Posted Date Start ☒

Posted Date End ☒

Site ☒

Clinician ☒

Insurance ☒

Patient ☒

☐ Self Pay

☐ Bill Insurance

Pmt Source ☒

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒

☐ Patient ☐ Insuran

☐ Patient ☐ Insuran

☐ Manually Posted

☐ Auto Post Payments

☐ Outstanding Balance

☐ Credit Balance

☒ Clear Filters

1096 matching transactions found.

Show Insurance/
Patient Balances ☐

Show Sites ☒

Show Clinicians ☒

Show Patients ☒

Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
👁 Romero, Caesar	250.00								
👁 SRVC: 5/30/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 6/5/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 Ruiz, Richard	125.00								
👁 SRVC: 5/31/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 Scott, Lorea	750.00								
👁 SRVC: 4/4/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 4/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 4/18/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 4/25/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 6/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 6/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 Snyder, Colton C	125.00								
👁 SRVC: 4/5/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 Taliferro, Miya	375.00								
👁 SRVC: 5/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 6/9/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 6/16/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 Tingle, Joseph	250.00								
👁 SRVC: 4/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 4/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 Westover, Christina D	125.00								
👁 SRVC: 4/7/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 Wood, Russell	375.00								
👁 SRVC: 4/19/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 5/31/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 6/7/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 Ybarra-Gonzales, Miranda	500.00								
👁 SRVC: 4/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 4/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 5/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
👁 SRVC: 6/9/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				

7/30/23, 8:05 PM

Sign Out Edit View Format Reports Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Coml

Service Date Start ☒ 9/1/2022

Service Date End ☒ 7/30/2023

Payment Date Start ☒

Payment Date End ☒

Posted Date Start ☒

Posted Date End ☒

Site ☒

Clinician ☒

Insurance ☒

Patient ☒

☐ Self Pay

☐ Bill Insurance

Pmt Source ☒

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒

☐ Patient ☐ Insuran

☐ Patient ☐ Insuran

☐ Manually Posted

☐ Auto Post Payments

☐ Outstanding Balance

☐ Credit Balance

☒ Clear Filters

1096 matching transactions found.

Show Insurance/
Patient Balances ☐

Show Sites ☒

Show Clinicians ☒

Show Patients ☒

Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Gerall, Judith	125.00								
SRVC: 6/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Gonzales, Lupe	875.00								
SRVC: 6/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Grado, Antonio	500.00								
SRVC: 6/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Griego, Jr., Leroy	500.00								
SRVC: 6/28/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/5/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Jackson, Charles	125.00								
SRVC: 7/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ludwig, Edward	125.00								
SRVC: 7/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
McKee Young, Danny Rey	125.00								
SRVC: 7/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Meraz, Esmerelda	125.00								
SRVC: 7/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Padilla, Juan	375.00								
SRVC: 7/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				

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Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Coml

Service Date Start ☒ 9/1/2022

Service Date End ☒ 7/30/2023

Payment Date Start ☒

Payment Date End ☒

Posted Date Start ☒

Posted Date End ☒

Site ☒

Clinician ☒

Insurance ☒

Patient ☒

☐ Self Pay

☐ Bill Insurance

Pmt Source ☒

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒

☐ Patient ☐ Insurance

☐ Patient ☐ Insurance

☐ Manually Posted

☐ Auto Post Payments

☐ Outstanding Balance

☐ Credit Balance

☒ Clear Filters

1096 matching transactions found.

Show Insurance/
Patient Balances ☐

Show Sites ☒

Show Patients ☒

Show Clinicians ☒

Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Padilla, Juan	375.00								
SRVC: 7/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ramirez, Juan	125.00								
SRVC: 6/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Romero, Andrew	750.00								
SRVC: 6/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Romero, Caesar	375.00								
SRVC: 6/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ruiz, Richard	375.00								
SRVC: 6/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/5/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Scott, Lorea	125.00								
SRVC: 6/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Sierra, Erik	125.00								
SRVC: 7/18/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Taliferro, Miya	125.00								
SRVC: 7/7/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ybarra, Martin M	125.00								
SRVC: 7/5/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Yniguez, Thomas J	125.00								
SRVC: 7/5/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				

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Patient Account

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Auto Post Payments

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Online I

Provider Report

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Collections Report

Patient Aging

Insurance Aging

Coml

Service Date Start

X

9/1/2022

Site

X

Service Date End

X

7/30/2023

Clinician

X

Karissa Andazola, CSW

Payment Date Start

X

Insurance

X

Payment Date End

X

Patient

X

Posted Date Start

X

Posted Date End

X

Pmt Source

X

☐ Patient ☐ Insurance

Billing Code

X

Pmt/Adj Code

X

Balance Type

X

☐ Patient ☐ Insurance

☐ Self Pay ☐ Bill Insurance

☐ Manually Posted ☐ Auto Post Payments

☐ Outstanding Balance ☐ Credit Balance

X Clear Filters

1120 matching transactions found.

Show Insurance/
Patient Balances ☒

Show Sites ☒

Show Patients ☒

Show Clinicians ☒

Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/18/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Karissa Andazola, CSW	240.00								
Lazzell, Shanti	150.00								
SRVC: 7/25/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
SRVC: 7/26/2023	90.00	0.00	0.00	BAL DUE: \$90.00	H0038 Peer Support				
Lopez, Henry	90.00								
SRVC: 7/24/2023	90.00	0.00	0.00	BAL DUE: \$90.00	H0038 Peer Support				
SPIN Supporting People In	2,470.00								
Christina Wolford, LCSW	1,890.00								
Alexander, Johnathan P									
SRVC: 2/14/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Avelar, Michael									
SRVC: 2/7/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 2/16/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 3/15/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 3/9/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 3/22/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Baker, Nathan									
SRVC: 9/20/2022		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support				
Bautista, Oscar	40.00								
SRVC: 2/20/2023	40.00	0.00	0.00	BAL DUE: \$40.00	H0038 Peer Support Group				
SRVC: 2/23/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 3/1/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 3/8/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Bierner, Brian									
SRVC: 3/21/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Brewer, Molynda									
SRVC: 9/13/2022		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support				
SRVC: 10/25/2022		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support				
Fiorentino, Charles									
SRVC: 11/16/2022		0.00	0.00	BAL DUE: \$0.00	90853 Group Psychotherapy				
SRVC: 11/17/2022		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				

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Patient Account	Batch Statements	Reports	Auto Post Payments	Manual Post Payments	Online	
Provider Report	Deposit Report	Payment Report	Collections Report	Patient Aging	Insurance Aging	Coml
Service Date Start <input checked="" type="checkbox"/> 9/1/2022	<input checked="" type="checkbox"/> 7/30/2023	Site <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pmt Source <input checked="" type="checkbox"/> <input type="radio"/> Patient <input type="radio"/> Insuran		
Service Date End <input checked="" type="checkbox"/>		Clinician <input checked="" type="checkbox"/> Michelle Grayless, MSW, CSW		Billing Code <input checked="" type="checkbox"/>		
Payment Date Start <input checked="" type="checkbox"/>		Insurance <input checked="" type="checkbox"/>		Pmt/Adj Code <input checked="" type="checkbox"/>		
Payment Date End <input checked="" type="checkbox"/>		Patient <input checked="" type="checkbox"/>		Balance Type <input checked="" type="checkbox"/> <input type="checkbox"/> Patient <input type="checkbox"/> Insuran		
Posted Date Start <input checked="" type="checkbox"/>			<input type="radio"/> Self Pay <input type="radio"/> Bill Insurance	<input type="checkbox"/> Manually Posted <input type="checkbox"/> Outstanding Balance		
Posted Date End <input checked="" type="checkbox"/>			<input type="checkbox"/> Auto Post Payments <input type="checkbox"/> Credit Balance			
<input checked="" type="checkbox"/> Clear Filters	443 matching transactions found.	Show Insurance/ Patient Balances <input checked="" type="checkbox"/>	Show Sites <input checked="" type="checkbox"/> Show Clinicians <input checked="" type="checkbox"/>	Show Patients <input checked="" type="checkbox"/> Show Insurance <input type="checkbox"/>	Detail	Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 6/7/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Michelle Grayless, MSW, CSW	7,280.00								
Avelar, Michael	500.00								
SRVC: 6/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Brannan, Billy O	375.00								
SRVC: 6/13/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/18/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Bridges, Josh	375.00								
SRVC: 6/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Carbajal, Ronnie J	125.00								
SRVC: 7/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Dominguez, Joseph	375.00								
SRVC: 7/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Duva, Danielle	280.00								
SRVC: 7/7/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/7/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Fiorentino, Charles	125.00								
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Gerall, Judith	125.00								
SRVC: 6/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Gonzales, Lupe	875.00								
SRVC: 6/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				

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Service Date Start
X
9/1/2022

Service Date End
X
7/30/2023

Payment Date Start
X

Payment Date End
X

Posted Date Start
X

Posted Date End
X

Site
X

Clinician
X
Michelle Grayless, MSW, CSW

Insurance
X

Patient
X

Pmt Source
X
Patient
Insurance

Billing Code
X

Pmt/Adj Code
X

Balance Type
X
Patient
Insurance

Manually Posted
Auto Post Payments

Outstanding Balance
Credit Balance

X
Clear Filters

443 matching transactions found.

Show Insurance/Patient Balances
X

Show Sites
X

Show Patients
X

Show Clinicians
X

Show Insurance

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 6/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Gonzales, Lupe	875.00								
SRVC: 6/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/3/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Grado, Antonio	500.00								
SRVC: 6/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Griego, Jr., Leroy	500.00								
SRVC: 6/28/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/5/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Jackson, Charles	125.00								
SRVC: 7/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ludwig, Edward	125.00								
SRVC: 7/21/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
McKee Young, Danny Rey	125.00								
SRVC: 7/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Meraz, Esmerelda	125.00								
SRVC: 7/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Padilla, Juan	375.00								
SRVC: 7/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ramirez, Juan	125.00								

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7/30/23, 8:22 PM

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Service Date Start ☒ 9/1/2022

Service Date End ☒ 7/30/2023

Payment Date Start ☒

Payment Date End ☒

Posted Date Start ☒

Posted Date End ☒

Site ☒

Clinician ☒ Michelle Grayless, MSW, CSW

Insurance ☒

Patient ☒

☐ Self Pay
☒ Bill Insurance

Pmt Source ☒

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒

☐ Patient ☐ Insurance

☐ Manually Posted
☐ Auto Post Payments

☐ Outstanding Balance
☐ Credit Balance

☒ Clear Filters

443 matching transactions found.

Show Insurance/
Patient Balances ☒

Show Sites ☒

Show Patients ☒

Show Clinicians ☒

Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Padilla, Juan	375.00								
SRVC: 7/6/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ramirez, Juan	125.00								
SRVC: 6/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Romero, Andrew	750.00								
SRVC: 6/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/20/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/10/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/24/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Romero, Caesar	375.00								
SRVC: 6/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 6/26/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ruiz, Richard	375.00								
SRVC: 6/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/5/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/12/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Scott, Lorea	125.00								
SRVC: 6/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Sierra, Erik	125.00								
SRVC: 7/18/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Taliferro, Miya	125.00								
SRVC: 7/7/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Ybarra, Martin M	125.00								
SRVC: 7/5/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Yniguez, Thomas J	125.00								
SRVC: 7/5/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psycchotherapy 60 Min.				

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Insurance Aging

Coml

Service Date Start ☒ 7/1/2023

Service Date End ☒ 7/30/2023

Payment Date Start ☒

Payment Date End ☒

Posted Date Start ☒

Posted Date End ☒

Site ☒

Clinician ☒

Insurance ☒

Patient ☒

☐ Self Pay

☐ Bill Insurance

Pmt Source ☒

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒

☐ Patient ☐ Insuran

☐ Patient ☐ Insuran

☐ Manually Posted

☐ Auto Post Payments

☐ Outstanding Balance

☐ Credit Balance

☒ Clear Filters

1086 matching transactions found.

Show Insurance/
Patient Balances ☒

Show Sites ☒

Show Clinicians ☒

Show Patients ☒

Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Deming	3,643.74								
Amber Patterson, CPSW	2,542.02								
<input checked="" type="radio"/> Avelar, Michael	252.90								
<input checked="" type="radio"/> SRVC: 7/6/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
<input checked="" type="radio"/> SRVC: 7/7/2023	75.00	0.00	0.00	BAL DUE: \$75.00	H0038 Peer Support				
<input checked="" type="radio"/> SRVC: 7/12/2023	117.90	0.00	0.00	BAL DUE: \$117.90	H2015 Comprehensive Community Support Servi				
<input checked="" type="radio"/> Barraza, Victoria M	117.90								
<input checked="" type="radio"/> SRVC: 7/14/2023	117.90	0.00	0.00	BAL DUE: \$117.90	H2015 Comprehensive Community Support Servi				
<input checked="" type="radio"/> Carbajal, Yvonne	75.00								
<input checked="" type="radio"/> SRVC: 7/3/2023	75.00	0.00	0.00	BAL DUE: \$75.00	H0038 Peer Support				
<input checked="" type="radio"/> Castillo, Jerry	75.00								
<input checked="" type="radio"/> SRVC: 7/5/2023	75.00	0.00	0.00	BAL DUE: \$75.00	H0038 Peer Support				
<input checked="" type="radio"/> Davis, Kenneth	154.32								
<input checked="" type="radio"/> SRVC: 7/3/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
<input checked="" type="radio"/> SRVC: 7/14/2023	94.32	0.00	0.00	BAL DUE: \$94.32	H2015 Comprehensive Community Support Servi				
<input checked="" type="radio"/> Dill, Tammy	308.64								
<input checked="" type="radio"/> SRVC: 7/3/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
<input checked="" type="radio"/> SRVC: 7/7/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
<input checked="" type="radio"/> SRVC: 7/12/2023	94.32	0.00	0.00	BAL DUE: \$94.32	H2015 Comprehensive Community Support Servi				
<input checked="" type="radio"/> SRVC: 7/14/2023	94.32	0.00	0.00	BAL DUE: \$94.32	H2015 Comprehensive Community Support Servi				
<input checked="" type="radio"/> Foster, Dana	60.00								
<input checked="" type="radio"/> SRVC: 7/5/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
<input checked="" type="radio"/> Hand, Nancy	117.90								
<input checked="" type="radio"/> SRVC: 7/11/2023	117.90	0.00	0.00	BAL DUE: \$117.90	H2015 Comprehensive Community Support Servi				
<input checked="" type="radio"/> Hernandez, Jimmy	188.64								
<input checked="" type="radio"/> SRVC: 7/10/2023	94.32	0.00	0.00	BAL DUE: \$94.32	H2015 Comprehensive Community Support Servi				
<input checked="" type="radio"/> SRVC: 7/14/2023	94.32	0.00	0.00	BAL DUE: \$94.32	H2015 Comprehensive Community Support Servi				
<input checked="" type="radio"/> Hodges, Chyanne	310.80								
<input checked="" type="radio"/> SRVC: 7/7/2023	75.00	0.00	0.00	BAL DUE: \$75.00	H0038 Peer Support				
<input checked="" type="radio"/> SRVC: 7/11/2023	117.90	0.00	0.00	BAL DUE: \$117.90	H2015 Comprehensive Community Support Servi				
<input checked="" type="radio"/> SRVC: 7/13/2023	117.90	0.00	0.00	BAL DUE: \$117.90	H2015 Comprehensive Community Support Servi				
<input checked="" type="radio"/> Mariscal, April	117.90								

Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 7/1/2023SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceXPatientInsurance
Billing CodeXBilling Code
Pmt/Adj CodeXPmt/Adj Code
Balance TypeXPatientInsurance
Manually PostedOutstanding Balance
Auto Post PaymentsCredit Balance

Self PayBill Insurance

Manually PostedOutstanding Balance
Auto Post PaymentsCredit Balance

X Clear Filters1086 matching transactions found.

Show Insurance/Patient BalancesX

Show SitesXShow PatientsX
Show CliniciansXShow Insurance

DetailSumma

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Mariscal, April	117.90								
SRVC: 7/13/2023	117.90	0.00	0.00	BAL DUE: \$117.90				H2015 Comprehensive Community Support Servi	
Marquez Duarte, Martha	117.90								
SRVC: 7/10/2023	117.90	0.00	0.00	BAL DUE: \$117.90				H2015 Comprehensive Community Support Servi	
Regalado, Malissa	192.90								
SRVC: 7/7/2023	75.00	0.00	0.00	BAL DUE: \$75.00				H0038 Peer Support	
SRVC: 7/14/2023	117.90	0.00	0.00	BAL DUE: \$117.90				H2015 Comprehensive Community Support Servi	
Roach, Amber D	154.32								
SRVC: 7/6/2023	60.00	0.00	0.00	BAL DUE: \$60.00				H0038 Peer Support	
SRVC: 7/13/2023	94.32	0.00	0.00	BAL DUE: \$94.32				H2015 Comprehensive Community Support Servi	
Romero, Andrew	120.00								
SRVC: 7/5/2023	60.00	0.00	0.00	BAL DUE: \$60.00				H0038 Peer Support	
SRVC: 7/7/2023	60.00	0.00	0.00	BAL DUE: \$60.00				H0038 Peer Support	
Romero, Caesar	60.00								
SRVC: 7/7/2023	60.00	0.00	0.00	BAL DUE: \$60.00				H0038 Peer Support	
Smith, Elijah	117.90								
SRVC: 7/11/2023	117.90	0.00	0.00	BAL DUE: \$117.90				H2015 Comprehensive Community Support Servi	
Jesse Berkowitz, LMSW	605.00								
Brogdon, Delia	175.00								
SRVC: 7/27/2023	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	
SRVC: 7/27/2023	30.00	0.00	0.00	BAL DUE: \$30.00				90853 Group Psychotherapy	
Dominguez, Ernesto	60.00								
SRVC: 7/24/2023	30.00	0.00	0.00	BAL DUE: \$30.00				90853 Group Psychotherapy	
SRVC: 7/27/2023	30.00	0.00	0.00	BAL DUE: \$30.00				90853 Group Psychotherapy	
Foster, Dana	185.00								
SRVC: 7/24/2023	30.00	0.00	0.00	BAL DUE: \$30.00				90853 Group Psychotherapy	
SRVC: 7/27/2023	30.00	0.00	0.00	BAL DUE: \$30.00				90853 Group Psychotherapy	
SRVC: 7/27/2023	125.00	0.00	0.00	BAL DUE: \$125.00				90837 Psychotherapy 60 Min.	
Romero, Andrew	60.00								
SRVC: 7/24/2023	30.00	0.00	0.00	BAL DUE: \$30.00				90853 Group Psychotherapy	
SRVC: 7/27/2023	30.00	0.00	0.00	BAL DUE: \$30.00				90853 Group Psychotherapy	
Watt, Sharon	125.00								

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Sign Out
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Patient Account
Batch Statements
Reports
Auto Post Payments
Manual Post Payments
Online

Provider Report
Deposit Report
Payment Report
Collections Report
Patient Aging
Insurance Aging
Com

Service Date Start
X
7/1/2023

Service Date End
X
7/30/2023

Payment Date Start
X

Payment Date End
X

Posted Date Start
X

Posted Date End
X

Site
X

Clinician
X

Insurance
X

Patient
X

Pmt Source
X
Patient
Insuran

Billing Code
X

Pmt/Adj Code
X

Balance Type
X
Patient
Insuran

Manually Posted
Auto Post Payments

Outstanding Balance
Credit Balance

X
Clear Filters
1086 matching transactions found.

Show Insurance/ Patient Balances

Show Sites
Show Patients
Show Clinicians
Show Insurance

Detail
Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Watt, Sharon	125.00								
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Joy Leatherman, CPSW, CSW	30.00								
Foster, Dana	15.00								
SRVC: 7/26/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Romero, Andrew	15.00								
SRVC: 7/26/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Kathy Quarrell, CPSW	466.72								
Dominguez, Ernesto	15.00								
SRVC: 7/18/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Fiorentino, Charles	23.58								
SRVC: 7/13/2023	23.58	0.00	0.00	BAL DUE: \$23.58	H2015 Comprehensive Community Support Service				
Foster, Dana	23.58								
SRVC: 7/13/2023	23.58	0.00	0.00	BAL DUE: \$23.58	H2015 Comprehensive Community Support Service				
Hernandez, Jimmy	157.28								
SRVC: 7/25/2023	157.28	0.00	0.00	BAL DUE: \$157.28	H2015 Comprehensive Community Support Service				
Michel, Toby	60.00								
SRVC: 7/22/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Murillo, Angelica	30.00								
SRVC: 7/3/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/14/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Watt, Sharon	157.28								
SRVC: 7/20/2023	157.28	0.00	0.00	BAL DUE: \$157.28	H2015 Comprehensive Community Support Service				
Deming- Men's Transitional	664.56								
Patricia Perez, CPSW	664.56								
Dominguez, Ernesto	60.00								
SRVC: 7/14/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Hernandez, Jimmy	157.28								
SRVC: 7/2/2023	78.64	0.00	0.00	BAL DUE: \$78.64	H2015 Comprehensive Community Support Service				
SRVC: 7/8/2023	78.64	0.00	0.00	BAL DUE: \$78.64	H2015 Comprehensive Community Support Service				
Jackson, Charles	60.00								
SRVC: 7/17/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				

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7/30/23, 8:28 PM

Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 7/1/2023SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX Patient Insurance
Billing CodeX
Pmt/Adj CodeX
Balance TypeX Patient Insurance
Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

Self Pay
Bill Insurance

X Clear Filters1086 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Ellis, Michael	169.00								
SRVC: 7/25/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
SRVC: 7/25/2023	24.00	0.00	0.00	BAL DUE: \$24.00	H0049 Alcohol And Drug Screening (asam) Medica				
Escobar, Nancy	169.00								
SRVC: 7/7/2023		0.00	0.00	BAL DUE: \$0.00	1220f Screened For Depression				
SRVC: 7/7/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
SRVC: 7/7/2023	24.00	0.00	0.00	BAL DUE: \$24.00	H0049 Alcohol And Drug Screening (asam) Medica				
Daniella Ramirez, CPSW	812.28								
Cyrus, Sarah	60.00								
SRVC: 7/17/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Hayes, Christopher	75.00								
SRVC: 7/5/2023	75.00	0.00	0.00	BAL DUE: \$75.00	H0038 Peer Support				
Johnson, Pamela	78.64								
SRVC: 7/17/2023	78.64	0.00	0.00	BAL DUE: \$78.64	H2015 Comprehensive Community Support Servio				
Lopez, Henry	105.00								
SRVC: 7/7/2023	105.00	0.00	0.00	BAL DUE: \$105.00	H0038 Peer Support				
Martinez, Seniada	145.00								
SRVC: 7/10/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Mudry, Crystal	150.00								
SRVC: 7/5/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
SRVC: 7/18/2023	90.00	0.00	0.00	BAL DUE: \$90.00	H0038 Peer Support				
Sierra, Alexander	78.64								
SRVC: 7/7/2023	78.64	0.00	0.00	BAL DUE: \$78.64	H2015 Comprehensive Community Support Servio				
White, Michael	60.00								
SRVC: 7/7/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Yniguez, Maisie	60.00								
SRVC: 7/18/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Jesse Berkowitz, LMSW	330.00								
Bridges, Josh	60.00								
SRVC: 7/3/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90853 Group Psychotherapy				
SRVC: 7/5/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90853 Group Psychotherapy				
Foster, Dana	120.00								

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingCom

Service Date StartX 7/1/2023SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPmt SourceX Patient Insurance
Payment Date EndXBilling CodeX
Posted Date StartXPmt/Adj CodeX
Posted Date EndXBalance TypeX Patient Insurance
Manually PostedOutstanding Balance
Auto Post PaymentsCredit Balance

Clear Filters1086 matching transactions found.Show Insurance/
Patient BalancesShow SitesShow Patients
Show CliniciansShow InsuranceDetailSumma

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Foster, Dana	120.00								
SRVC: 7/3/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90853 Group Psychotherapy				
SRVC: 7/5/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90853 Group Psychotherapy				
SRVC: 7/17/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90853 Group Psychotherapy				
SRVC: 7/20/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90853 Group Psychotherapy				
Haassman, Jessica	30.00								
SRVC: 7/17/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90853 Group Psychotherapy				
Romero, Andrew	90.00								
SRVC: 7/5/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90853 Group Psychotherapy				
SRVC: 7/17/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90853 Group Psychotherapy				
SRVC: 7/20/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90853 Group Psychotherapy				
Watt, Sharon	30.00								
SRVC: 7/17/2023	30.00	0.00	0.00	BAL DUE: \$30.00	90853 Group Psychotherapy				
Joy Leatherman, CPSW	8,471.50								
Alcorta, Anthony H	145.00								
SRVC: 7/14/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Armendariz Barela, Eva	165.00								
SRVC: 7/10/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/14/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/15/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/17/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/18/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038 Peer Support				
SRVC: 7/22/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/23/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Baker, Nathan	75.00								
SRVC: 7/12/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038 Peer Support				
SRVC: 7/21/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/22/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
Brewer, Molynda	15.00								
SRVC: 7/19/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Cardona, John J	15.00								
SRVC: 7/3/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				

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7/30/23, 8:30 PM

7/30/23, 8:30 PM

Sign Out
Edit
View
Format
Reports
Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Com

Service Date Start
X
7/1/2023
Site
X

Service Date End
X
7/30/2023
Clinician
X

Payment Date Start
X
Insurance
X

Payment Date End
X
Patient
X

Posted Date Start
X

Posted Date End
X

Pmt Source
X
Patient
Insurance

Billing Code
X

Pmt/Adj Code
X

Balance Type
X
Patient
Insurance

Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

Self Pay
Bill Insurance

X
Clear Filters

1086 matching transactions found.

Show Insurance/Patient Balances

Show Sites
Show Patients
Show Clinicians
Show Insurance

Detail
Summary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/15/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038	Peer Support			
Gooden, Kelvin D	270.00								
SRVC: 7/3/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
SRVC: 7/6/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
SRVC: 7/8/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038	Peer Support			
SRVC: 7/9/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038	Peer Support			
SRVC: 7/10/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038	Peer Support			
SRVC: 7/10/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
SRVC: 7/16/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038	Peer Support			
SRVC: 7/16/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
SRVC: 7/17/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
SRVC: 7/18/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
SRVC: 7/22/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038	Peer Support			
SRVC: 7/22/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
Griego, Christopher	285.00								
SRVC: 7/1/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038	Peer Support			
SRVC: 7/1/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
SRVC: 7/1/2023	75.00	0.00	0.00	BAL DUE: \$75.00	H0038	Peer Support			
SRVC: 7/2/2023		0.00	0.00	BAL DUE: \$0.00	H2015	Comprehensive Community Support Service			
SRVC: 7/3/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038	Peer Support			
SRVC: 7/3/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
SRVC: 7/15/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038	Peer Support			
SRVC: 7/18/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
SRVC: 7/18/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
Groves, Kliff	30.00								
SRVC: 7/3/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038	Peer Support			
SRVC: 7/9/2023		0.00	0.00	BAL DUE: \$0.00	H2015	Comprehensive Community Support Service			
Hartsfield, Christopher	150.00								
SRVC: 7/5/2023	75.00	0.00	0.00	BAL DUE: \$75.00	H0038	Peer Support			
SRVC: 7/6/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038	Peer Support			
SRVC: 7/9/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038	Peer Support			
Haves, Christopher	15.00								

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Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Coml

Service Date Start

X

7/1/2023

Site

X

Service Date End

X

7/30/2023

Clinician

X

Payment Date Start

X

Insurance

X

Payment Date End

X

Patient

X

Posted Date Start

X

Posted Date End

X

Sign Out Edit View Format Reports Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Com

Service Date Start ☒ 7/1/2023

Service Date End ☒ 7/30/2023

Payment Date Start ☒

Payment Date End ☒

Posted Date Start ☒

Posted Date End ☒

Site ☒

Clinician ☒

Insurance ☒

Patient ☒

☐ Self Pay

☐ Bill Insurance

Pmt Source ☒

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒

☐ Patient ☐ Insuran

☐ Patient ☐ Insuran

☐ Manually Posted

☐ Auto Post Payments

☐ Outstanding Balance

☐ Credit Balance

☒ Clear Filters

1086 matching transactions found.

Show Insurance/
Patient Balances ☒

Show Sites ☒

Show Clinicians ☒

Show Patients ☒

Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/1/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/7/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/11/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/12/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038 Peer Support				
SRVC: 7/22/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/23/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Johnson, Prentis	45.00								
SRVC: 7/4/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/9/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038 Peer Support				
Kilbourne, Liane	210.00								
SRVC: 7/3/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/7/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/8/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/8/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/11/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038 Peer Support				
SRVC: 7/14/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/17/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/17/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/18/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/23/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Lazzell, Shanti	228.64								
SRVC: 7/1/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/2/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/4/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/6/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/7/2023	39.32	0.00	0.00	BAL DUE: \$39.32	H2015 Comprehensive Community Support Service				
SRVC: 7/7/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/8/2023	39.32	0.00	0.00	BAL DUE: \$39.32	H2015 Comprehensive Community Support Service				
SRVC: 7/8/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/9/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/9/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/10/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				

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7/30/23, 8:34 PM

Sign OutEditViewFormatReportsChat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingCom

Service Date StartX7/1/2023SiteX
Service Date EndX7/30/2023ClinicianX
Payment Date StartXPmt SourceXPatientInsurance
Payment Date EndXBilling CodeX
Posted Date StartXPmt/Adj CodeX
Posted Date EndXBalance TypeXPatientInsurance
Manually PostedOutstanding Balance
Auto Post PaymentsCredit Balance

Self PayBill Insurance

Show Insurance/Patient BalancesXShow SitesXShow PatientsXShow CliniciansXShow Insurance

DetailSumma

Clear Filters1086 matching transactions found.

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Pflanz, Kristina	235.00								
SRVC: 7/7/2023	145.00	0.00	0.00	BAL DUE: \$145.00	T1007 Treatment Plan				
SRVC: 7/8/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/9/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/11/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/14/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/14/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/15/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/15/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/18/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/19/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
Porras, Jose	45.00								
SRVC: 7/2/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/4/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/10/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/11/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/16/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/23/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
Proudlock, Johnathon	450.00								
SRVC: 7/6/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/7/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/8/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/9/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/11/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support				
SRVC: 7/12/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/14/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
SRVC: 7/19/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038 Peer Support				
SRVC: 7/19/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/21/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
SRVC: 7/22/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/23/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				

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Sign Out Edit View Format Reports Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Com

Service Date Start ☒ 7/1/2023

Service Date End ☒ 7/30/2023

Payment Date Start ☒

Payment Date End ☒

Posted Date Start ☒

Posted Date End ☒

Site ☒

Clinician ☒

Insurance ☒

Patient ☒

☐ Self Pay

☐ Bill Insurance

Pmt Source ☒

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒

☐ Patient ☐ Insuran

☐ Patient ☐ Insuran

☐ Manually Posted

☐ Auto Post Payments

☐ Outstanding Balance

☐ Credit Balance

☒ Clear Filters

1086 matching transactions found.

Show Insurance/
Patient Balances ☒

Show Sites ☒

Show Clinicians ☒

Show Patients ☒

Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/23/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
Radan, Robert	60.00								
SRVC: 7/11/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/15/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/18/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/20/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
Rivera, Matias	30.00								
SRVC: 7/2/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/7/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/10/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/14/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/16/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Robles, Joshua F	150.00								
SRVC: 7/7/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/8/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/9/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038 Peer Support				
SRVC: 7/10/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Rodriguez, Melissa	75.00								
SRVC: 7/7/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/9/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/10/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/11/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/14/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Sanders, Crystal	315.00								
SRVC: 7/2/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/3/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/3/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/4/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/3/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/5/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/6/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				

Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date Start X 7/1/2023
Service Date End X 7/30/2023
Payment Date Start X
Payment Date End X
Posted Date Start X
Posted Date End X

Site X
Clinician X
Insurance X
Patient X

Self Pay
Bill Insurance

Manually Posted
Auto Post Payments

Pmt Source X
Billing Code X
Pmt/Adj Code X
Balance Type X

Patient Insurance

Outstanding Balance
Credit Balance

X Clear Filters1086 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/6/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/7/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/7/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/9/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/9/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/9/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/10/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/10/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/11/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/14/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/17/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/21/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/21/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Sierra, Caesar I	135.00								
SRVC: 7/3/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/4/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/6/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/7/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/22/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Sprague, David S	150.00								
SRVC: 7/1/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/3/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/4/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/7/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/7/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/8/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/18/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/23/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/23/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
Tafoya, Chris	525.00								
SRVC: 7/2/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				

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7/30/23, 8:39 PM

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 7/1/2023SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceXPatientInsurance
Billing CodeX
Pmt/Adj CodeX
Balance TypeXPatientInsurance
Manually PostedOutstanding Balance
Auto Post PaymentsCredit Balance

Self PayBill Insurance

Manually PostedOutstanding Balance
Auto Post PaymentsCredit Balance

X Clear Filters1086 matching transactions found.

Show Insurance/Patient BalancesX

Show SitesXShow PatientsXShow CliniciansXShow Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/29/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
Griego, Christopher	1,320.00								
SRVC: 7/1/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/8/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/11/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/14/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/15/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/18/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/20/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/25/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/27/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/29/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
Hamlett, Raymond	120.00								
SRVC: 7/8/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
Hartsfield, Christopher									
SRVC: 7/4/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Hernandez, Amanda	120.00								
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/4/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/8/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
Hobbs MacFarlane, Carrie	480.00								
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/4/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/21/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/25/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
Johnson, Pamela	540.00								
SRVC: 7/22/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/27/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 7/1/2023SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX Patient Insurance
Billing CodeX
Pmt/Adj CodeX
Balance TypeX Patient Insurance
Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

Self Pay
Bill Insurance

X Clear Filters1086 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Johnson, Pamela	040.00								
SRVC: 7/22/2023	180.00	0.00	0.00	BAL DUE: \$180.00				H0038 Peer Support	
SRVC: 7/27/2023	180.00	0.00	0.00	BAL DUE: \$180.00				H0038 Peer Support	
SRVC: 7/29/2023	180.00	0.00	0.00	BAL DUE: \$180.00				H0038 Peer Support	
Johnson, Prentis									
SRVC: 7/4/2023		0.00	0.00	BAL DUE: \$0.00				H0038 Peer Support Group	
Kilbourne, Liane	600.00								
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00				H0038 Peer Support Group	
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00				H0038 Peer Support Group	
SRVC: 7/15/2023		0.00	0.00	BAL DUE: \$0.00				H0038 Peer Support Group	
SRVC: 7/18/2023	120.00	0.00	0.00	BAL DUE: \$120.00				H0038 Peer Support Group	
SRVC: 7/20/2023	180.00	0.00	0.00	BAL DUE: \$180.00				H0038 Peer Support	
SRVC: 7/29/2023	180.00	0.00	0.00	BAL DUE: \$180.00				H0038 Peer Support	
Lopez, Henry	1,680.00								
SRVC: 7/1/2023		0.00	0.00	BAL DUE: \$0.00				H0038 Peer Support Group	
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00				H0038 Peer Support Group	
SRVC: 7/6/2023		0.00	0.00	BAL DUE: \$0.00				H0038 Peer Support Group	
SRVC: 7/4/2023		0.00	0.00	BAL DUE: \$0.00				H0038 Peer Support Group	
SRVC: 7/8/2023	120.00	0.00	0.00	BAL DUE: \$120.00				H0038 Peer Support Group	
SRVC: 7/11/2023	120.00	0.00	0.00	BAL DUE: \$120.00				H0038 Peer Support Group	
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00				H0038 Peer Support Group	
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00				H0038 Peer Support Group	
SRVC: 7/14/2023	120.00	0.00	0.00	BAL DUE: \$120.00				H0038 Peer Support Group	
SRVC: 7/15/2023		0.00	0.00	BAL DUE: \$0.00				H0038 Peer Support Group	
SRVC: 7/18/2023	120.00	0.00	0.00	BAL DUE: \$120.00				H0038 Peer Support Group	
SRVC: 7/20/2023	180.00	0.00	0.00	BAL DUE: \$180.00				H0038 Peer Support	
SRVC: 7/21/2023	180.00	0.00	0.00	BAL DUE: \$180.00				H0038 Peer Support	
SRVC: 7/22/2023	180.00	0.00	0.00	BAL DUE: \$180.00				H0038 Peer Support	
SRVC: 7/25/2023	180.00	0.00	0.00	BAL DUE: \$180.00				H0038 Peer Support	
SRVC: 7/27/2023	180.00	0.00	0.00	BAL DUE: \$180.00				H0038 Peer Support	
SRVC: 7/29/2023	180.00	0.00	0.00	BAL DUE: \$180.00				H0038 Peer Support	
Madrid, Bernie	120.00								

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 7/1/2023SiteX

Service Date EndX 7/30/2023ClinicianX

Payment Date StartXPmt SourceX Patient Insurance

Payment Date EndXBilling CodeX

Posted Date StartXPmt/Adj CodeX

Posted Date EndXBalance TypeX Patient Insurance

Self Pay

Bill Insurance

Manually Posted

Auto Post Payments

Outstanding Balance

Credit Balance

X Clear Filters1086 matching transactions found.

Show Insurance/Patient BalancesX

Show SitesXShow PatientsXShow CliniciansXShow Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/29/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
Madrid, Bernie	120.00								
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00					
SRVC: 7/8/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
Marquez, James A	600.00								
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00					
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
SRVC: 7/15/2023		0.00	0.00	BAL DUE: \$0.00					
SRVC: 7/18/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
SRVC: 7/22/2023	180.00	0.00	0.00	BAL DUE: \$180.00					
SRVC: 7/29/2023	180.00	0.00	0.00	BAL DUE: \$180.00					
McAllister, Mark	840.00								
SRVC: 7/11/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00					
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
SRVC: 7/14/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
SRVC: 7/15/2023		0.00	0.00	BAL DUE: \$0.00					
SRVC: 7/18/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
SRVC: 7/22/2023	180.00	0.00	0.00	BAL DUE: \$180.00					
SRVC: 7/27/2023	180.00	0.00	0.00	BAL DUE: \$180.00					
Mudry, Crystal	1,020.00								
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00					
SRVC: 7/6/2023		0.00	0.00	BAL DUE: \$0.00					
SRVC: 7/7/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
SRVC: 7/11/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00					
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
SRVC: 7/18/2023	120.00	0.00	0.00	BAL DUE: \$120.00					
SRVC: 7/20/2023	180.00	0.00	0.00	BAL DUE: \$180.00					
SRVC: 7/22/2023	180.00	0.00	0.00	BAL DUE: \$180.00					
SRVC: 7/25/2023	180.00	0.00	0.00	BAL DUE: \$180.00					
Padilla, Juan									

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Service Date Start ☒ 7/1/2023 ☐

Service Date End ☒ 7/30/2023 ☐

Payment Date Start ☒

Payment Date End ☒

Posted Date Start ☒

Posted Date End ☒

Site ☒

Clinician ☒

Insurance ☒

Patient ☒

☐ Self Pay ☒ Bill Insurance

Pmt Source ☒

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒

☐ Patient ☐ Insurance

☐ Manually Posted ☐ Outstanding Balance

☐ Auto Post Payments ☐ Credit Balance

☒ Clear Filters

1086 matching transactions found.

Show Insurance/
Patient Balances ☒

Show Sites ☒

Show Clinicians ☒

Show Patients ☒

Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/14/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/15/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/18/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/20/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/21/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/22/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/25/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/27/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
Sierra, Caesar I	300.00								
SRVC: 7/1/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/6/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/18/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/27/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
Sprague, David S	540.00								
SRVC: 7/8/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/11/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/14/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/29/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
Tafoya, Chris	360.00								
SRVC: 7/20/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/21/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
Taliferro, Miya									
SRVC: 7/29/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
Tatom, Cody R	540.00								
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/4/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/11/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				

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Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 7/1/2023SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceXPatientInsurance
Billing CodeX
Pmt/Adj CodeX
Balance TypeXPatientInsurance
Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

Self Pay
Bill Insurance

X Clear Filters1086 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/15/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/18/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/20/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
Versteeg, Amber	120.00								
SRVC: 7/8/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
White, Michael									
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Yates, Elizabeth	120.00								
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/15/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Ybarra, Martin M	780.00								
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/13/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/14/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
SRVC: 7/15/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/20/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/21/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
SRVC: 7/25/2023	180.00	0.00	0.00	BAL DUE: \$180.00	H0038 Peer Support				
Yniguez, Maisie	120.00								
SRVC: 7/1/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/15/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/18/2023	120.00	0.00	0.00	BAL DUE: \$120.00	H0038 Peer Support Group				
Michelle Grayless, MSW, CSW									
Mudry, Crystal									
SRVC: 7/17/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
Patricia Perez, CPSW	1,280.00								
Bridges, Josh	280.00								
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				

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Service Date Start

Service Date End

Payment Date Start

Payment Date End

Posted Date Start

Posted Date End

7/1/2023

7/30/2023

Site

Clinician

Insurance

Patient

Pmt Source

Billing Code

Pmt/Adj Code

Balance Type

☐ Patient
☐ Insuran

☐ Self Pay
☐ Bill Insurance

☐ Manually Posted
☐ Auto Post Payments

☐ Outstanding Balance
☐ Credit Balance

X Clear Filters

1086 matching transactions found.

Show Insurance/Patient Balances

Show Sites

Show Patients

Show Clinicians

Show Insurance

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/30/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/30/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
Brewer, Molynda	45.00								
SRVC: 7/26/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/27/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
Crouthamel, Brian									
SRVC: 7/27/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
Dominguez, Luis	45.00								
SRVC: 7/27/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038 Peer Support				
Duran, John	15.00								
SRVC: 7/28/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Eddington, Lynn	60.00								
SRVC: 7/26/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/27/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/27/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Gooden, Kelvin D	105.00								
SRVC: 7/26/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/26/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/29/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/29/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
Griego, Christopher	150.00								
SRVC: 7/26/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/26/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/26/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/27/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/27/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/28/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038 Peer Support				
Haley, Shelly	60.00								
SRVC: 7/29/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/30/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/30/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				

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Service Date Start ☒ 7/1/2023 

Service Date End ☒ 7/30/2023 

Payment Date Start ☒

Payment Date End ☒

Posted Date Start ☒


Posted Date End ☒

Site ☒

Clinician ☒

Insurance ☒

Patient ☒

 ☐ Self Pay ☐ Bill Insurance

☐ Manually Posted ☐ Auto Post Payments

Pmt Source ☒

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒

☐ Patient ☐ Insurance

☐ Outstanding Balance ☐ Credit Balance

☒ Clear Filters

1086 matching transactions found.

Show Insurance/
Patient Balances ☒

Show Sites ☒ Show Patients ☒
Show Clinicians ☒ Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Sierra, Caesar I	15.00								
SRVC: 7/28/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Sprague, David S	30.00								
SRVC: 7/30/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
Tatom, Cody R	15.00								
SRVC: 7/26/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Yazzie, Joshua	45.00								
SRVC: 7/30/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038 Peer Support				
Yniguez, Maisie	195.00								
SRVC: 7/26/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
SRVC: 7/27/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/27/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/27/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/28/2023	45.00	0.00	0.00	BAL DUE: \$45.00	H0038 Peer Support				
SRVC: 7/28/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/29/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Silver Tabor, BMSW, CSW	2,892.99								
Arambula, Ramon	113.68								
SRVC: 7/12/2023	113.68	0.00	0.00	BAL DUE: \$113.68	H2015 Comprehensive Community Support Servi				
Armendariz Barela, Eva	173.68								
SRVC: 7/10/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Servi				
SRVC: 7/24/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/26/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/28/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Servi				
Crouthamel, Brian	85.26								
SRVC: 7/10/2023	85.26	0.00	0.00	BAL DUE: \$85.26	H2015 Comprehensive Community Support Servi				
Cummins, Sheldon	85.26								
SRVC: 7/10/2023	85.26	0.00	0.00	BAL DUE: \$85.26	H2015 Comprehensive Community Support Servi				
Eddington, Lynn	170.52								
SRVC: 7/28/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Servi				
SRVC: 7/28/2023	113.68	0.00	0.00	BAL DUE: \$113.68	H2015 Comprehensive Community Support Servi				
Flores- Romero, Virginia	85.26								

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Service Date Start X 7/1/2023
Service Date End X 7/30/2023
Payment Date Start X
Payment Date End X
Posted Date Start X
Posted Date End X

Site X
Clinician X
Insurance X
Patient X

Self Pay
Bill Insurance

Manually Posted
Auto Post Payments

Pmt Source X
Billing Code X
Pmt/Adj Code X
Balance Type X

Patient
Insurance

Outstanding Balance
Credit Balance

X Clear Filters1086 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Flores- Romero, Virginia	85.26								
SRVC: 7/14/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Service				
SRVC: 7/14/2023	28.42	0.00	0.00	BAL DUE: \$28.42	H2015 Comprehensive Community Support Service				
Flores, Grisel	56.84								
SRVC: 7/6/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Service				
Gooden, Kelvin D	15.00								
SRVC: 7/26/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Griego, Christopher	435.00								
SRVC: 7/28/2023	435.00	0.00	0.00	BAL DUE: \$435.00	T1007 Treatment Plan				
Haynes, Cherokee	30.00								
SRVC: 7/18/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
Johnson, Pamela	255.78								
SRVC: 7/11/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Service				
SRVC: 7/13/2023	85.26	0.00	0.00	BAL DUE: \$85.26	H2015 Comprehensive Community Support Service				
SRVC: 7/26/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Service				
SRVC: 7/26/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Service				
Madrid, Bernie	228.83								
SRVC: 7/14/2023	228.83	0.00	0.00	BAL DUE: \$228.83	H2011 Csw Crisis Intervention Face To Face W/ M				
Maldonado, Byron	56.84								
SRVC: 7/13/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Service				
Mudry, Crystal	113.68								
SRVC: 7/5/2023	113.68	0.00	0.00	BAL DUE: \$113.68	H2015 Comprehensive Community Support Service				
Proudlock, Johnathon	15.00								
SRVC: 7/12/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Ramos, Javier	15.00								
SRVC: 7/14/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Rodriguez, Myra K	56.84								
SRVC: 7/5/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Service				
Rosales, Mary H	595.00								
SRVC: 7/28/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
SRVC: 7/28/2023	580.00	0.00	0.00	BAL DUE: \$580.00	T1007 Treatment Plan				
Ruiz, Richard	28.42								

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Provider Report

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Collections Report

Patient Aging

Insurance Aging

Coml

Service Date Start

X

7/1/2023

Site

X

Service Date End

X

7/30/2023

Clinician

X

Payment Date Start

X

Insurance

X

Payment Date End

X

Patient

X

Posted Date Start

X

Posted Date End

X

Self Pay

Bill Insurance

Pmt Source

X

☐ Patient ☐ Insurance

Billing Code

X

Pmt/Adj Code

X

Balance Type

X

☐ Patient ☐ Insurance

Manually Posted

Auto Post Payments

Outstanding Balance

Credit Balance

X Clear Filters

1086 matching transactions found.

Show Insurance/
Patient Balances ☒

Show Sites ☒

Show Patients ☒

Show Clinicians ☒

Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/28/2023	580.00	0.00	0.00	BAL DUE: \$580.00	T1007 Treatment Plan				
Ruiz, Richard	28.42								
SRVC: 7/10/2023	28.42	0.00	0.00	BAL DUE: \$28.42	H2015 Comprehensive Community Support Service				
Sanders, Crystal	60.00								
SRVC: 7/6/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
SRVC: 7/26/2023	30.00	0.00	0.00	BAL DUE: \$30.00	H0038 Peer Support				
Sanders, Kimberly	85.26								
SRVC: 7/10/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Service				
SRVC: 7/10/2023	28.42	0.00	0.00	BAL DUE: \$28.42	H2015 Comprehensive Community Support Service				
Sierra, Caesar I	15.00								
SRVC: 7/26/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Tafoya, Chris	56.84								
SRVC: 7/12/2023	56.84	0.00	0.00	BAL DUE: \$56.84	H2015 Comprehensive Community Support Service				
Yates, Elizabeth	60.00								
SRVC: 7/12/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Veronica Diaz, CPSW	320.00								
Bridges, Josh									
SRVC: 7/10/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Escobar, Nancy	160.00								
SRVC: 7/7/2023	160.00	0.00	0.00	BAL DUE: \$160.00	H0038 Peer Support Group				
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/13/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/14/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/24/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/21/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/20/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/26/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Flores, Cristine									
SRVC: 7/26/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Foster, Dana									
SRVC: 7/10/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Gonzales, Irma	160.00								

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Patient Account

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Reports

Auto Post Payments

Manual Post Payments

Online

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

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Service Date Start

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Site

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Service Date End

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7/30/2023

Clinician

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Payment Date Start

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Insurance

X

Payment Date End

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Patient

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Posted Date Start

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Posted Date End

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Sign Out

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Manual Post Payments

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Provider Report

Deposit Report

Payment Report

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Patient Aging

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Payment Date End

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Posted Date Start

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Sign Out
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Service Date Start
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Service Date End
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Clinician
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Payment Date Start
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Insurance
X

Payment Date End
X
Patient
X

Posted Date Start
X

Posted Date End
X

Pmt Source
X
Patient
Insurance

Billing Code
X

Pmt/Adj Code
X

Balance Type
X
Patient
Insurance

Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

X
Clear Filters
1086 matching transactions found.
Show Insurance/ Patient Balances
Show Sites
Show Patients
Show Clinicians
Show Insurance
Detail
Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 7/24/2023	23.68	0.00	0.00	BAL DUE: \$23.68	H2015 Comprehensive Community Support Service				
Jesse Berkowitz, LMSW									
Bridges, Josh	125.00								
SRVC: 7/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Foster, Dana	250.00								
SRVC: 7/11/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
SRVC: 7/17/2023	125.00	0.00	0.00	BAL DUE: \$125.00	90837 Psychotherapy 60 Min.				
Watt, Sharon	145.00								
SRVC: 7/11/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Lawren Davenport, CPSW									
Avelar, Michael	60.00								
SRVC: 7/16/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Duva, Danielle	120.00								
SRVC: 7/20/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/25/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
SRVC: 7/27/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Gallegos, Vincent	15.00								
SRVC: 7/4/2023	15.00	0.00	0.00	BAL DUE: \$15.00	H0038 Peer Support				
Griego, Jr., Leroy	60.00								
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/11/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
Hartsfield, Christopher	60.00								
SRVC: 7/11/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
SRVC: 7/13/2023		0.00	0.00	BAL DUE: \$0.00	H2015 Comprehensive Community Support Service				
Hernandez, Charles									
SRVC: 7/5/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				
Jackson, Charles	60.00								
SRVC: 7/14/2023	60.00	0.00	0.00	BAL DUE: \$60.00	H0038 Peer Support				
McKee Young, Danny Rey									
SRVC: 7/12/2023		0.00	0.00	BAL DUE: \$0.00	H0038 Peer Support Group				

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Sign Out

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Format

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Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Com

Service Date Start

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7/1/2023

Site

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Service Date End

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7/30/2023

Clinician

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Payment Date Start

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Insurance

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Posted Date Start

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Service Date StartX 1/1/2019SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX
Billing CodeX
Pmt/Adj CodeX
Balance TypeX

☐ Patient ☐ Insurance
☐ Self Pay ☐ Bill Insurance
☐ Manually Posted ☐ Outstanding Balance
☐ Auto Post Payments ☐ Credit Balance

X Clear Filters38 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSumma

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Deming	145.00								
Kathy Quarrell, CPSW	145.00								
Griego, Jr., Leroy	145.00								
SRVC: 4/19/2023	145.00	0.00	0.00	BAL DUE: \$145.00	T1007 Treatment Plan				
Hidalgo Haven	725.00								
Christina Wolford, LCSW	580.00								
Hernandez, Vicente	580.00								
SRVC: 4/21/2023	580.00	0.00	0.00	BAL DUE: \$580.00	T1007 Treatment Plan				
Veronica Diaz, CPSW	145.00								
Gooden, Kelvin D	145.00								
SRVC: 3/29/2023	145.00	0.00	0.00	BAL DUE: \$145.00	T1007 Treatment Plan				
SOS	5,075.00								
Amber Brandt, CPSW	1,015.00								
Griego, Christopher	580.00								
SRVC: 6/5/2023	580.00	0.00	0.00	BAL DUE: \$580.00	T1007 Treatment Plan				
Marquez, James A	145.00								
SRVC: 6/24/2023	145.00	0.00	0.00	BAL DUE: \$145.00	T1007 Treatment Plan				
Mcbride, Torie	290.00								
SRVC: 6/4/2023	290.00	0.00	0.00	BAL DUE: \$290.00	T1007 Treatment Plan				
Christina Wolford, LCSW	1,740.00								
Avelar, Michael	145.00								
SRVC: 3/1/2023	145.00	0.00	0.00	BAL DUE: \$145.00	T1007 Treatment Plan				
Crouthamel, Brian	145.00								
SRVC: 6/6/2023	145.00	0.00	0.00	BAL DUE: \$145.00	T1007 Treatment Plan				
Haynes, Cherokee	580.00								
SRVC: 6/12/2023	580.00	0.00	0.00	BAL DUE: \$580.00	T1007 Treatment Plan				
Hernandez, Vicente	580.00								
SRVC: 4/20/2023	580.00	0.00	0.00	BAL DUE: \$580.00	T1007 Treatment Plan				
Meraz, Esmerelda									
SRVC: 12/9/2022		0.00	0.00	BAL DUE: \$0.00	T1007 Treatment Plan				
Padilla, Juan	145.00								
SRVC: 6/14/2023	145.00	0.00	0.00	BAL DUE: \$145.00	T1007 Treatment Plan				
Sanchez, Shawna									

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<table><thead><tr><th></th><th>Charges</th><th>Paid</th><th>Adjust.</th><th>Credit</th><th>Fee</th><th>Refund</th><th>Recoup</th><th>Write-Off</th><th>Bad Debt</th></tr></thead><tbody><tr><td>SRVC: 7/28/2023</td><td>580.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$580.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>SPIN Supporting People In</td><td>435.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Christina Wolford, LCSW</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Sanders, Crystal</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 5/5/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Lawren Davenport, CPSW</td><td>290.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Medina, Samuel</td><td>290.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 5/30/2023</td><td>290.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$290.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Women's Transitional Home-</td><td>1,740.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Joy Leatherman, CPSW</td><td>1,740.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Dominguez, Ernesto</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 4/17/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Duva, Danielle</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 5/5/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Gerall, Judith</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 6/6/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Gomez, Frank</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 6/8/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Gordon, Sebastion S</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 5/24/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Peralta, Mariah</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 5/12/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Ramirez, Juan</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 6/13/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Robles, Joshua F</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 5/17/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Scott, Lorea</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 6/6/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Ybarra-Gonzales, Miranda</td><td>290.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 4/21/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>SRVC: 4/21/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr><tr><td>Yniguez, Thomas J</td><td>145.00</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>SRVC: 4/19/2023</td><td>145.00</td><td>0.00</td><td>0.00</td><td>BAL DUE: \$145.00</td><td></td><td></td><td></td><td>T1007 Treatment Plan</td><td></td></tr></tbody></table>													Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt	SRVC: 7/28/2023	580.00	0.00	0.00	BAL DUE: \$580.00				T1007 Treatment Plan		SPIN Supporting People In	435.00									Christina Wolford, LCSW	145.00									Sanders, Crystal	145.00									SRVC: 5/5/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		Lawren Davenport, CPSW	290.00									Medina, Samuel	290.00									SRVC: 5/30/2023	290.00	0.00	0.00	BAL DUE: \$290.00				T1007 Treatment Plan		Women's Transitional Home-	1,740.00									Joy Leatherman, CPSW	1,740.00									Dominguez, Ernesto	145.00									SRVC: 4/17/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		Duva, Danielle	145.00									SRVC: 5/5/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		Gerall, Judith	145.00									SRVC: 6/6/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		Gomez, Frank	145.00									SRVC: 6/8/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		Gordon, Sebastion S	145.00									SRVC: 5/24/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		Peralta, Mariah	145.00									SRVC: 5/12/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		Ramirez, Juan	145.00									SRVC: 6/13/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		Robles, Joshua F	145.00									SRVC: 5/17/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		Scott, Lorea	145.00									SRVC: 6/6/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		Ybarra-Gonzales, Miranda	290.00									SRVC: 4/21/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		SRVC: 4/21/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan		Yniguez, Thomas J	145.00									SRVC: 4/19/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan	
	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt																																																																																																																																																																																																																																																																																																																																																						
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Dominguez, Ernesto	145.00																																																																																																																																																																																																																																																																																																																																																														
SRVC: 4/17/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							
Duva, Danielle	145.00																																																																																																																																																																																																																																																																																																																																																														
SRVC: 5/5/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							
Gerall, Judith	145.00																																																																																																																																																																																																																																																																																																																																																														
SRVC: 6/6/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							
Gomez, Frank	145.00																																																																																																																																																																																																																																																																																																																																																														
SRVC: 6/8/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							
Gordon, Sebastion S	145.00																																																																																																																																																																																																																																																																																																																																																														
SRVC: 5/24/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							
Peralta, Mariah	145.00																																																																																																																																																																																																																																																																																																																																																														
SRVC: 5/12/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							
Ramirez, Juan	145.00																																																																																																																																																																																																																																																																																																																																																														
SRVC: 6/13/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							
Robles, Joshua F	145.00																																																																																																																																																																																																																																																																																																																																																														
SRVC: 5/17/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							
Scott, Lorea	145.00																																																																																																																																																																																																																																																																																																																																																														
SRVC: 6/6/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							
Ybarra-Gonzales, Miranda	290.00																																																																																																																																																																																																																																																																																																																																																														
SRVC: 4/21/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							
SRVC: 4/21/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							
Yniguez, Thomas J	145.00																																																																																																																																																																																																																																																																																																																																																														
SRVC: 4/19/2023	145.00	0.00	0.00	BAL DUE: \$145.00				T1007 Treatment Plan																																																																																																																																																																																																																																																																																																																																																							

Sign Out Edit View Format Reports Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online I

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Coml

Service Date Start

X

1/1/2019

Site

X

Service Date End

X

7/30/2023

Clinician

X

Payment Date Start

X

Insurance

X

Payment Date End

X

Patient

X

Posted Date Start

X

Posted Date End

X

Pmt Source

X

☐ Patient ☐ Insuran

Billing Code

X

Pmt/Adj Code

X

Balance Type

X

☐ Patient ☐ Insuran

☐ Self Pay ☐ Bill Insurance

☐ Manually Posted ☐ Outstanding Balance

☐ Auto Post Payments ☐ Credit Balance

X Clear Filters

112 matching transactions found.

Show Insurance/
Patient Balances ☒

Show Sites ☒

Show Patients ☒

Show Clinicians ☒

Show Insurance ☐

Detail

Summa

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Deming	615.00								
Christina Wolford, LCSW	190.00								
<input checked="" type="radio"/> Lemoyne, Hal G	105.00								
<input checked="" type="radio"/> SRVC: 4/21/2023	105.00	0.00	0.00	BAL DUE: \$105.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Porras, Maria R	85.00								
<input checked="" type="radio"/> SRVC: 3/1/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Kathy Quarrell, CPSW	85.00								
<input checked="" type="radio"/> Murillo, Angelica	85.00								
<input checked="" type="radio"/> SRVC: 5/12/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Michelle Grayless, MSW	340.00								
<input checked="" type="radio"/> Rhodes, Ira D	340.00								
<input checked="" type="radio"/> SRVC: 2/14/2023	340.00	0.00	0.00	BAL DUE: \$340.00	90834 Psychotherapy 45 Min.				
SOS	2,230.00								
Christina Wolford, LCSW	1,700.00								
<input checked="" type="radio"/> Abeyta, Jason									
<input checked="" type="radio"/> SRVC: 3/7/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 3/8/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Bailey, Thomas	85.00								
<input checked="" type="radio"/> SRVC: 4/5/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Clay, Scott A	85.00								
<input checked="" type="radio"/> SRVC: 4/3/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Cruz, Armida									
<input checked="" type="radio"/> SRVC: 4/27/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Dominguez, Ernesto S.									
<input checked="" type="radio"/> SRVC: 4/26/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Dow, Andrew									
<input checked="" type="radio"/> SRVC: 5/2/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Flores, Lucas	85.00								
<input checked="" type="radio"/> SRVC: 4/7/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Gooden, Kelvin D	85.00								
<input checked="" type="radio"/> SRVC: 3/23/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Guenther, Julie	85.00								
<input checked="" type="radio"/> SRVC: 3/28/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				

Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 1/1/2019SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX Patient Insurance
Billing CodeX
Pmt/Adj CodeX
Balance TypeX Patient Insurance
Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

Self Pay
Bill Insurance

X Clear Filters112 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 4/7/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Gooden, Kelvin D	85.00								
SRVC: 3/23/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Guenther, Julie	85.00								
SRVC: 2/28/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Hayes, Christopher	85.00								
SRVC: 3/20/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Johnson, Prentis	85.00								
SRVC: 3/23/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Lam, Amy	85.00								
SRVC: 3/23/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Lemoyne, Hal G	85.00								
SRVC: 3/23/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Lopez, Henry	85.00								
SRVC: 3/23/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Munoz, Casey	85.00								
SRVC: 3/23/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Murillo, Angelica	340.00								
SRVC: 12/5/2022	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
SRVC: 1/25/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
SRVC: 2/3/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
SRVC: 1/3/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Myers, Joseph	85.00								
SRVC: 2/20/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Padilla, Leo	85.00								
SRVC: 4/4/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Perry, Marcella L	85.00								
SRVC: 4/1/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 8/30/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 8/9/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 3/23/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Reyes, Mia R									

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 1/1/2019SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPmt SourceX Patient Insurance
Payment Date EndXBilling CodeX
Posted Date StartXPmt/Adj CodeX
Posted Date EndXBalance TypeX Patient Insurance
Manually PostedOutstanding Balance
Auto Post PaymentsCredit Balance

X Clear Filters112 matching transactions found.Show Insurance/Patient BalancesXShow SitesXShow PatientsXShow CliniciansXShow InsuranceDetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
⦿ Perry, Marcella L	85.00								
⦿ SRVC: 4/1/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
⦿ SRVC: 8/30/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
⦿ SRVC: 8/9/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
⦿ SRVC: 3/23/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
⦿ Reyes, Mia R									
⦿ SRVC: 10/25/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
⦿ SRVC: 11/3/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
⦿ Rodriguez, Myra K	85.00								
⦿ SRVC: 4/3/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
⦿ Rogers, Gary W									
⦿ SRVC: 4/21/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
⦿ Sylvester, Richard									
⦿ SRVC: 2/23/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
⦿ SRVC: 2/16/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
⦿ Williams, Greg W	85.00								
⦿ SRVC: 3/23/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Daniella Ramirez, CPSW	85.00								
⦿ Rodriguez, Myra K	85.00								
⦿ SRVC: 3/29/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Joy Leatherman, CPSW	340.00								
⦿ Cardona, John J	85.00								
⦿ SRVC: 3/15/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
⦿ Rivers, Eric	85.00								
⦿ SRVC: 2/24/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
⦿ Torres, Rafael	85.00								
⦿ SRVC: 3/8/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
⦿ Verlander, Joseph	85.00								
⦿ SRVC: 3/1/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Michelle Grayless, MSW									
⦿ Dominguez, Ernesto S.									
⦿ SRVC: 12/22/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				

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Sign Out Edit View Format Reports Chat/Help

Patient Account

Batch Statements

Reports

Auto Post Payments

Manual Post Payments

Online I

Provider Report

Deposit Report

Payment Report

Collections Report

Patient Aging

Insurance Aging

Coml

Service Date Start ☒ 1/1/2019

Service Date End ☒ 7/30/2023

Payment Date Start ☒

Payment Date End ☒

Posted Date Start ☒

Posted Date End ☒

Site ☒

Clinician ☒

Insurance ☒

Patient ☒

☐ Patient ☐ Insurance

☐ Self Pay ☐ Bill Insurance

☐ Manually Posted ☐ Auto Post Payments

☐ Outstanding Balance ☐ Credit Balance

Pmt Source ☒

Billing Code ☒

Pmt/Adj Code ☒

Balance Type ☒

☐ Patient ☐ Insurance

☒ Clear Filters

112 matching transactions found.

Show Insurance/
Patient Balances ☒

Show Sites ☒

Show Clinicians ☒

Show Patients ☒

Show Insurance ☐

Detail

Summa

Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Michelle Grayless, MSW								
Dominguez, Ernesto S.								
SRVC: 12/22/2021	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 1/5/2022	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 1/10/2022	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
Tomas Sandoval, CPSW 105.00								
Baker, Nathan 105.00								
SRVC: 4/4/2023	105.00	0.00	0.00	BAL DUE: \$105.00	90834 Psychotherapy 45 Min.			
SPIN Supporting People In 530.00								
Christina Wolford, LCSW 255.00								
Aguilar, Ivan 85.00								
SRVC: 3/14/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.			
Carrillo, Sylvia A								
SRVC: 9/28/2021	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
Hicks, Terance								
SRVC: 2/9/2022	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
Huerta, Maria M								
SRVC: 10/15/2021	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 10/21/2021	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
Maynes, Anthony								
SRVC: 5/9/2022	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
Medina, Norma								
SRVC: 1/3/2022	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
Rogers, Gary W								
SRVC: 9/29/2021	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 9/30/2021	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
Sedillo, Melvin								
SRVC: 1/6/2022	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 1/3/2022	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 11/12/2021	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 11/13/2021	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 11/17/2021	0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				

Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 1/1/2019SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX Patient Insurance
Billing CodeX
Pmt/Adj CodeX
Balance TypeX Patient Insurance
Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

Self Pay
Bill Insurance

X Clear Filters112 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 11/17/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 1/7/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 1/8/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 1/11/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 1/12/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
Sylvester, Richard									
SRVC: 2/23/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
Yniguez, Thomas J	170.00								
SRVC: 2/17/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
SRVC: 3/17/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Zamora, Natalya G									
SRVC: 9/28/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
Joy Leatherman, CPSW	190.00								
Abeyta, Jason									
SRVC: 4/17/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
Lam, Amy	85.00								
SRVC: 3/7/2023	85.00	0.00	0.00	BAL DUE: \$85.00	90834 Psychotherapy 45 Min.				
Padilla, Leo	105.00								
SRVC: 2/7/2023	105.00	0.00	0.00	BAL DUE: \$105.00	90834 Psychotherapy 45 Min.				
Michelle Grayless, MSW	85.00								
Brannan, Billy O									
SRVC: 10/19/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 10/26/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 11/2/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 11/16/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 11/23/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 11/30/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 12/14/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 12/21/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 12/28/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
SRVC: 1/4/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				

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Sign Out Edit View Format Reports Chat/Help

Patient Account	Batch Statements	Reports	Auto Post Payments	Manual Post Payments	Online	
Provider Report	Deposit Report	Payment Report	Collections Report	Patient Aging	Insurance Aging	Coml
Service Date Start <input checked="" type="checkbox"/> 1/1/2019	<input checked="" type="checkbox"/> 7/30/2023	Site <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pmt Source <input checked="" type="checkbox"/> <input type="radio"/> Patient <input type="radio"/> Insuran		
Service Date End <input checked="" type="checkbox"/>		Clinician <input checked="" type="checkbox"/>		Billing Code <input checked="" type="checkbox"/>		
Payment Date Start <input checked="" type="checkbox"/>		Insurance <input checked="" type="checkbox"/>		Pmt/Adj Code <input checked="" type="checkbox"/>		
Payment Date End <input checked="" type="checkbox"/>		Patient <input checked="" type="checkbox"/>		Balance Type <input checked="" type="checkbox"/> <input type="checkbox"/> Patient <input type="checkbox"/> Insuran		
Posted Date Start <input checked="" type="checkbox"/>				<input type="radio"/> Self Pay <input type="radio"/> Bill Insurance		
Posted Date End <input checked="" type="checkbox"/>				<input type="radio"/> Manually Posted <input type="radio"/> Auto Post Payments	<input type="radio"/> Outstanding Balance <input type="radio"/> Credit Balance	
<input checked="" type="checkbox"/> Clear Filters	112 matching transactions found.	Show Insurance/ Patient Balances <input checked="" type="checkbox"/>	Show Sites <input checked="" type="checkbox"/>	Show Patients <input checked="" type="checkbox"/>	Show Clinicians <input checked="" type="checkbox"/>	Show Insurance <input type="checkbox"/>
			Detail		Summa	

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
<input checked="" type="radio"/> SRVC: 12/28/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 1/4/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Dominguez, Ernesto S.									
<input checked="" type="radio"/> SRVC: 11/3/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 11/10/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 11/23/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Gonzales, Lupe									
<input checked="" type="radio"/> SRVC: 8/16/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 11/10/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 11/15/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 11/22/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 11/29/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 12/6/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 12/9/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 12/13/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 12/20/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 12/21/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 12/27/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 1/3/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 1/10/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Miller, Virginia									
<input checked="" type="radio"/> SRVC: 12/14/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 12/20/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 12/17/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 12/30/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Murillo, Angelica									
<input checked="" type="radio"/> SRVC: 8/10/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Rivera, Matias									
<input checked="" type="radio"/> SRVC: 4/8/2022		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> Seaberry, Jesse D									
<input checked="" type="radio"/> SRVC: 12/1/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				
<input checked="" type="radio"/> SRVC: 12/3/2021		0.00	0.00	BAL DUE: \$0.00	90834 Psychotherapy 45 Min.				

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 1/1/2019SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPmt SourceX Patient Insurance
Payment Date EndXBilling CodeX
Posted Date StartXPmt/Adj CodeX
Posted Date EndXBalance TypeX Patient Insurance
Manually PostedOutstanding Balance
Auto Post PaymentsCredit Balance

X Clear Filters221 matching transactions found.Show Insurance/Patient BalancesXShow SitesXShow PatientsXShow CliniciansXShow InsuranceDetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Hidalgo Haven	3,625.00								
Christina Wolford, LCSW	145.00								
Barrio, Ramon	145.00								
SRVC: 5/10/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Veronica Diaz, CPSW	3,480.00								
Baker, Johnnie Ann	145.00								
SRVC: 7/12/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Brown, Rebecca	290.00								
SRVC: 6/20/2023	290.00	0.00	0.00	BAL DUE: \$290.00	90791 Psych Diagnostic Interview				
Crouthamel, Brian	145.00								
SRVC: 6/5/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Goodale, Julie	145.00								
SRVC: 6/28/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Gooden, Kelvin D	145.00								
SRVC: 3/29/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Griego, Christopher	145.00								
SRVC: 6/19/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Hamlett, Raymond	145.00								
SRVC: 5/26/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Haynes, Cherokee	145.00								
SRVC: 6/22/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Hernandez, Charles	145.00								
SRVC: 6/27/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Hobbs MacFarlane, Carrie	145.00								
SRVC: 6/8/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Iturralde, Nabor	145.00								
SRVC: 6/2/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Maldonado, Byron	145.00								
SRVC: 7/13/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Martinez, Louis	145.00								
SRVC: 4/28/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Medina, Lorenzo	145.00								

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingCom

Service Date StartX 1/1/2019SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX Patient Insurance
Billing CodeX
Pmt/Adj CodeX
Balance TypeX Patient Insurance
Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

Self Pay
Bill Insurance

X Clear Filters221 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
SRVC: 4/28/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Medina, Lorenzo	145.00								
SRVC: 5/17/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Murphy, Dee'aun	145.00								
SRVC: 6/6/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Otero, Angela	145.00								
SRVC: 7/12/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Reynoso, Patrick	145.00								
SRVC: 7/26/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Rodriguez, Myra K	145.00								
SRVC: 7/5/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Rojo, Tracie	145.00								
SRVC: 5/3/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Torrez, Patty	145.00								
SRVC: 6/15/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Trujillo, Veronica	145.00								
SRVC: 6/6/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Wilson, Christina	145.00								
SRVC: 7/21/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Ybarra, Martin M	145.00								
SRVC: 6/29/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
SOS	8,565.00								
Amber Brandt, CPSW	1,305.00								
Griego, Christopher	145.00								
SRVC: 6/19/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Kilbourne, Liane	145.00								
SRVC: 5/20/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Madrid, Bernie	145.00								
SRVC: 6/20/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Mcbride, Torie	145.00								
SRVC: 5/31/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Radan, Robert	145.00								

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 1/1/2019SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX Patient Insurance
Billing CodeX
Pmt/Adj CodeX
Balance TypeX Patient Insurance
Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

Self Pay
Bill Insurance

X Clear Filters221 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Hartsfield, Christopher	145.00								
SRVC: 4/12/2023	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	
Ignacio, Patricia T									
SRVC: 6/2/2022		0.00	0.00	BAL DUE: \$0.00				90791 Psych Diagnostic Interview	
Jackson, Charles	290.00								
SRVC: 2/24/2023	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	
SRVC: 2/24/2023	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	
Johnson, Pamela									
SRVC: 11/28/2022		0.00	0.00	BAL DUE: \$0.00				90791 Psych Diagnostic Interview	
Johnson, Prentis									
SRVC: 11/15/2022		0.00	0.00	BAL DUE: \$0.00				90791 Psych Diagnostic Interview	
Jones, Colista	145.00								
SRVC: 1/13/2023	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	
Lemoyne, Hal G	290.00								
SRVC: 2/27/2023	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	
SRVC: 3/10/2023	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	
Lopez, Henry									
SRVC: 11/22/2022		0.00	0.00	BAL DUE: \$0.00				90791 Psych Diagnostic Interview	
Lucero, Erika									
SRVC: 12/8/2022		0.00	0.00	BAL DUE: \$0.00				90791 Psych Diagnostic Interview	
Malone, Mary									
SRVC: 1/30/2023		0.00	0.00	BAL DUE: \$0.00				90791 Psych Diagnostic Interview	
Martinez, Joseph	145.00								
SRVC: 8/22/2022	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	
Martinez, Patsy	145.00								
SRVC: 4/28/2023	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	
May, Michael	145.00								
SRVC: 8/8/2022	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	
McAllister, Mark	145.00								
SRVC: 8/1/2022	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	
Medina, Samuel	145.00								
SRVC: 5/19/2023	145.00	0.00	0.00	BAL DUE: \$145.00				90791 Psych Diagnostic Interview	

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 1/1/2019SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX
Billing CodeX
Pmt/Adj CodeX
Balance TypeX

☐ Patient ☐ Insuran
☐ Self Pay ☐ Bill Insurance
☐ Manually Posted ☐ Outstanding Balance
☐ Auto Post Payments ☐ Credit Balance

X Clear Filters221 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSumma

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Medina, Samuel	145.00								
SRVC: 5/19/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Miranda, Sergio									
SRVC: 12/16/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Mitchell, Stacy O									
SRVC: 11/9/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Mudry, Crystal	145.00								
SRVC: 4/21/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Munoz, Casey									
SRVC: 10/18/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Munoz, Olga									
SRVC: 10/11/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Munoz, Quiara									
SRVC: 1/30/2023		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Myers, Joseph	145.00								
SRVC: 8/23/2022	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Nevarez, Louise									
SRVC: 8/10/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Ortega Jr., Raymundo									
SRVC: 2/13/2023		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Padilla, Leo	145.00								
SRVC: 2/8/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Regalado, Julian									
SRVC: 10/26/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Rodriguez, Joseph									
SRVC: 10/20/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Sanchez, Shawna									
SRVC: 11/1/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Sanders, Crystal	145.00								
SRVC: 4/21/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Smith, Christopher									
SRVC: 5/11/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				

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Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 1/1/2019SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX Patient Insurance
Billing CodeX
Pmt/Adj CodeX
Balance TypeX Patient Insurance
Manually Posted
Auto Post Payments
Outstanding Balance
Credit Balance

Self Pay
Bill Insurance

X Clear Filters221 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Smith, Christopher									
SRVC: 5/11/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Smith, Elijah	145.00								
SRVC: 12/5/2022	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Sotelo, Maria									
SRVC: 9/22/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Sprague, David S	145.00								
SRVC: 4/20/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Tafoya Cozine, Juana									
SRVC: 10/11/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Taliferro, Miya									
SRVC: 12/15/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
True, Jeanette L									
SRVC: 10/10/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Verlander, Joseph									
SRVC: 2/10/2023		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
White, Michael									
SRVC: 12/30/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Wideman, Michael	145.00								
SRVC: 2/13/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Williams, David									
SRVC: 1/2/2023		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Williams, Greg W	145.00								
SRVC: 2/27/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Wood, Russell									
SRVC: 1/18/2023		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Yniguez, Thomas J	290.00								
SRVC: 1/18/2023		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
SRVC: 3/1/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
SRVC: 3/1/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
Daniella Ramirez, CPSW	870.00								
Clark, Arieanna	145.00								

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7/30/23, 9:46 PM

7/30/23, 9:46 PM

7/30/23, 9:51 PM

7/30/23, 9:52 PM

7/30/23, 9:53 PM

7/30/23, 9:55 PM

Sign Out Edit View Format Reports Chat/Help

Patient AccountBatch StatementsReportsAuto Post PaymentsManual Post PaymentsOnline I

Provider ReportDeposit ReportPayment ReportCollections ReportPatient AgingInsurance AgingComl

Service Date StartX 1/1/2019SiteX
Service Date EndX 7/30/2023ClinicianX
Payment Date StartXPatientX
Payment Date EndX
Posted Date StartX
Posted Date EndX

Pmt SourceX
Billing CodeX
Pmt/Adj CodeX
Balance TypeX
Manually Posted
Auto Post Payments

☐ Patient
☐ Insurance
☐ Self Pay
☐ Bill Insurance
☐ Outstanding Balance
☐ Credit Balance

X Clear Filters221 matching transactions found.

Show Insurance/
Patient Balances

Show Sites
Show Clinicians

Show Patients
Show Insurance

DetailSummary

	Charges	Paid	Adjust.	Credit	Fee	Refund	Recoup	Write-Off	Bad Debt
Jessie Berkowitz, LMSW									
⊙ Hernandez, Ramon									
⊙ SRVC: 4/7/2023		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Joy Leatherman, CPSW 435.00									
⊙ Bierner, Brian	145.00								
⊙ SRVC: 12/12/2022	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
⊙ Cabrera, Micaela G	145.00								
⊙ SRVC: 2/7/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
⊙ Castaneda, Priscilla									
⊙ SRVC: 11/11/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
⊙ Dominguez, Sandra	145.00								
⊙ SRVC: 3/10/2023	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				
⊙ Fox, Kevin M									
⊙ SRVC: 11/10/2022		0.00	0.00	BAL DUE: \$0.00	90791				
⊙ Gomez, Lisa R									
⊙ SRVC: 12/16/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
⊙ Medina, Joe G									
⊙ SRVC: 1/5/2023		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
⊙ Tellez, Sarah									
⊙ SRVC: 11/9/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Michelle Grayless, MSW									
⊙ Ferrara, Albert P									
⊙ SRVC: 9/17/2021		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
⊙ Hughes, M A									
⊙ SRVC: 10/27/2022		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
⊙ Miller, Virginia									
⊙ SRVC: 12/13/2021		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
⊙ Seaberry, Jesse D									
⊙ SRVC: 11/9/2021		0.00	0.00	BAL DUE: \$0.00	90791 Psych Diagnostic Interview				
Women's Transitional Home-	1,450.00								
Joy Leatherman, CPSW	1,450.00								
⊙ Avelar, Michael	145.00								
⊙ SRVC: 11/9/2021	145.00	0.00	0.00	BAL DUE: \$145.00	90791 Psych Diagnostic Interview				

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